

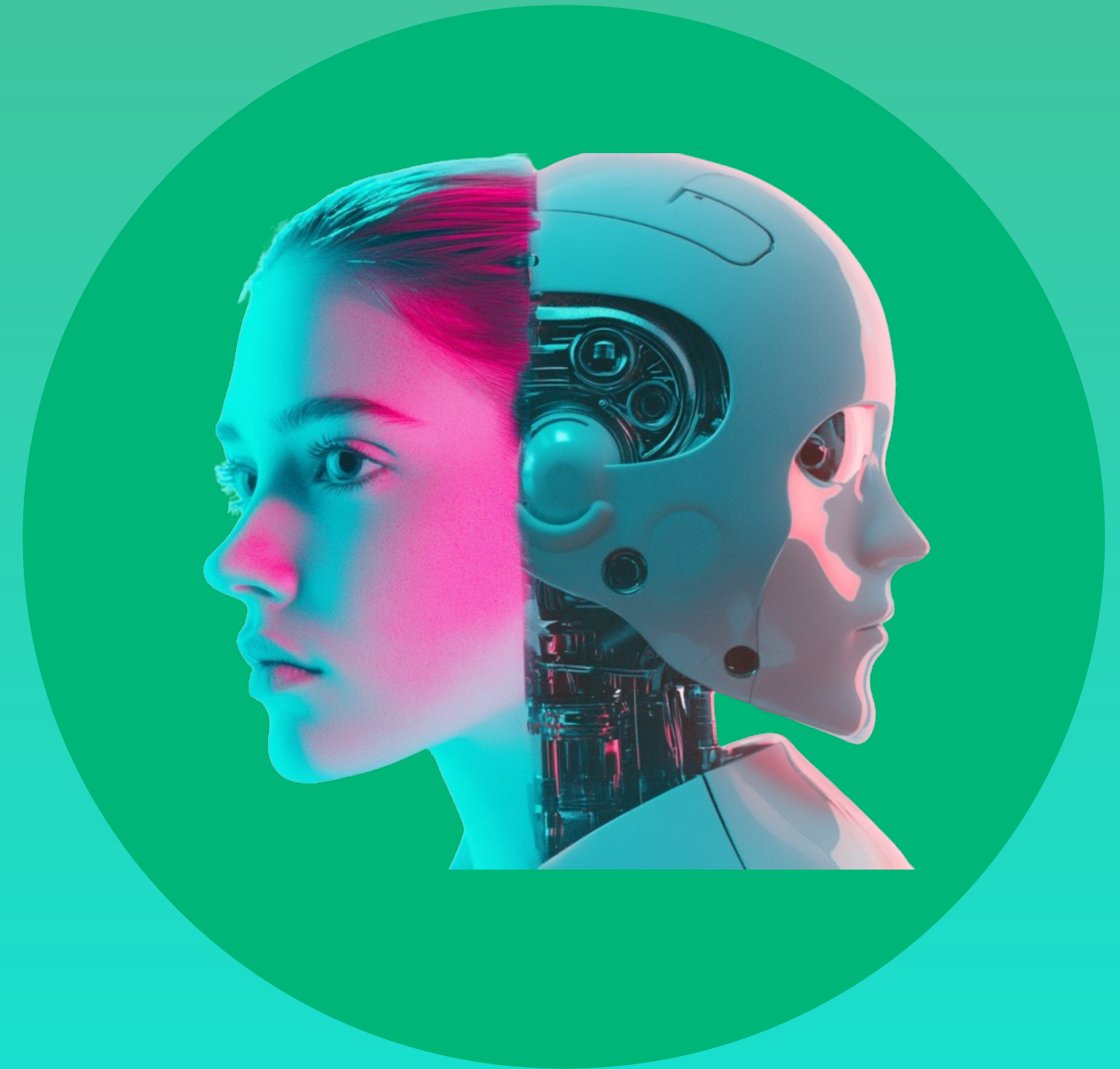


Putting AI to Work: Building Reliable Assistants for Your Nonprofit

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By the End of This Session, you Will Be Able To

Explain the difference between a chatbot, a copilot and an AI agent, and know which one fits your task.

Apply three governance questions before deploying any AI assistant in your organisation.

Plan an agent using a simple framework.

Build and test a custom GPT in ChatGPT using the seven-element configuration template.

Working examples

Volunteer Welcome Assistant and Funder Fit Check Assistant.

Tools we'll be using

ChatGPT (Plus) and its custom GPT builder. No code, no technical setup required.

Why Does This Matter Now?

Today's Key Shift

What you've been doing

Ask a question

Get an answer

Start again next time

Every conversation starts from scratch. The AI doesn't remember your organisation, your tone, or what you asked yesterday.

What's now possible

Give it a goal

Let it plan and act

Approve the important steps

An assistant that already knows your organisation, remembers your preferences, and works towards a goal, with you in control.

The Four Stages of AI

PERCEPTION → GENERATIVE → AGENTIC → PHYSICAL



Perception

Understands images, words, sounds.

Generative

Creates text, images, video.

Agentic

Perceives, reasons, plans, and acts.

YOU ARE HERE

Physical

Robots and real-world systems.

Framework: Jensen Huang, CES 2025 keynote (NVIDIA)

Agentic Browsers – ChatGPT Atlas



AGENTIC BROWSERS: FROM VIEWING TO DOING

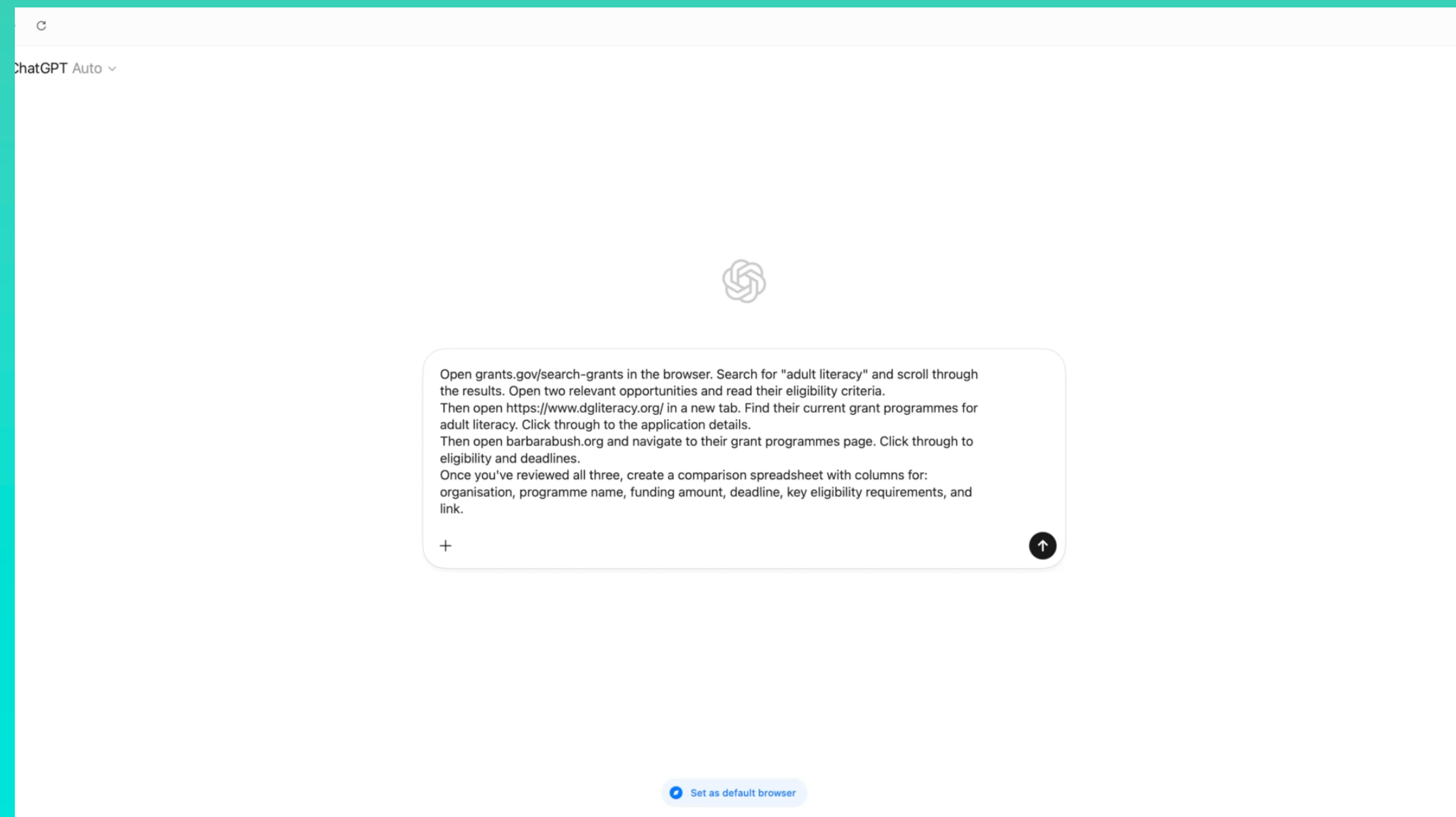
Instead of you clicking through pages, the browser itself can read, reason, and take action.

Open grants.gov/search-grants in the browser. Search for "adult literacy" and scroll through the results. Open two relevant opportunities and read their eligibility criteria.

Then open <https://www.dgliteracy.org/> in a new tab. Find their current grant programmes for adult literacy. Click through to the application details.

Then open barbarabush.org and navigate to their grant programmes page. Click through to eligibility and deadlines.

Once you've reviewed all three, create a comparison spreadsheet with columns for: organisation, programme name, funding amount, deadline, key eligibility requirements, and link.



Why this Matters for Nonprofits

BIG MISSIONS, SMALL TEAMS

Limited capacity

You run on small teams and stretched volunteers. Every hour matters.

Admin drains the mission

Repetitive tasks take time away from the work that moves your mission forward.

Enterprise tools, open access

You can now use the same AI as large organisations. Starting at \$20 a month.

Refocus on impact

Agents handle routine work. Your people focus on relationships, strategy, and impact.

What is an AI Assistant or Agent

Three Levels of AI

THE LANGUAGE LADDER

01

Chatbot

You ask, it answers.

*Like asking a stranger for directions.
Helpful once, but they don't know you
and won't remember you tomorrow.*

No memory · No action

02

Copilot

Works alongside you.

*Like a colleague looking over your
shoulder, offering ideas while you
stay in charge.*

Sessions 1 & 2 ✓

03

Agent

Takes a goal, plans, acts.

*Like a trained team member who
knows your organisation, follows your
process, and asks before making big
decisions.*

Today's focus



What is an AI Agent?

An AI agent is software that perceives context, reasons and plans, then takes actions toward a goal, with humans approving important steps.



Process information and make decisions



Learn and adapt from interactions



Automate workflows across fundraising, communications and volunteer management

Inside an Agent

Understand → Plan → Act → Check

WHAT THE AGENT IS SET UP WITH

Instructions

What it should do

Memory & context

What it knows

Rules & guardrails

What it must respect

Tools

What it can use

WHAT THE AGENT DOES

GOAL
input

1

Understand

Read the goal and what's available

2

Plan

Break it down into clear steps

3

Act

Use tools to do the work

4

Check

Is the result good enough?

RESULT
output

Not good enough? Adjust and try again

An agent receives a goal, works out the steps, uses tools to take action, then checks whether the result is good enough.

There are Hundreds of Agent Tools

A QUICK REASSURANCE



n8n

Stack AI

Lindy

Relevance AI

Crew AI

LangChain

AutoGPT

Wordware

Dify

Taskade

Vector Shift

Cohere

MindFlow

Flowise

Akkio

MS Copilot Studio

...and many more

Today, you need one.

ChatGPT and its custom GPT builder. The simplest, most accessible route.

The principles transfer to any tool later.

What Agents can Do for Your Nonprofit

PRACTICAL USE CASES

01

Donor acknowledgement

Personalised thank-you letters and follow-ups in your voice.

02

Grant application drafting

First-drafts, eligibility checks, gap identification.

03

Volunteer onboarding

FAQ responder and step-by-step guidance for new volunteers.

04

Board meeting prep

Summarising documents, drafting agendas, pulling key metrics.

05

Event planning

Checklists, timelines, and communication templates.

06

Community enquiry triage

Scanning incoming questions, so that they can be routed to the right resource.

What Does this Look Like in Practice?

Real-world Agents in Action

TWO EXAMPLES

DEMO 01

BABA

Bilingual Academic Bridge Agent

An educational agent helping bilingual students bridge between their native language and academic English.

DEMO 02

Virtual research team

Competitive Analysis Multi-Agent System

A multi-agent system where specialist agents collaborate to produce a research report.

Bilingual Academic Bridge Agent

BABA - built by GenFutures Lab, 2025

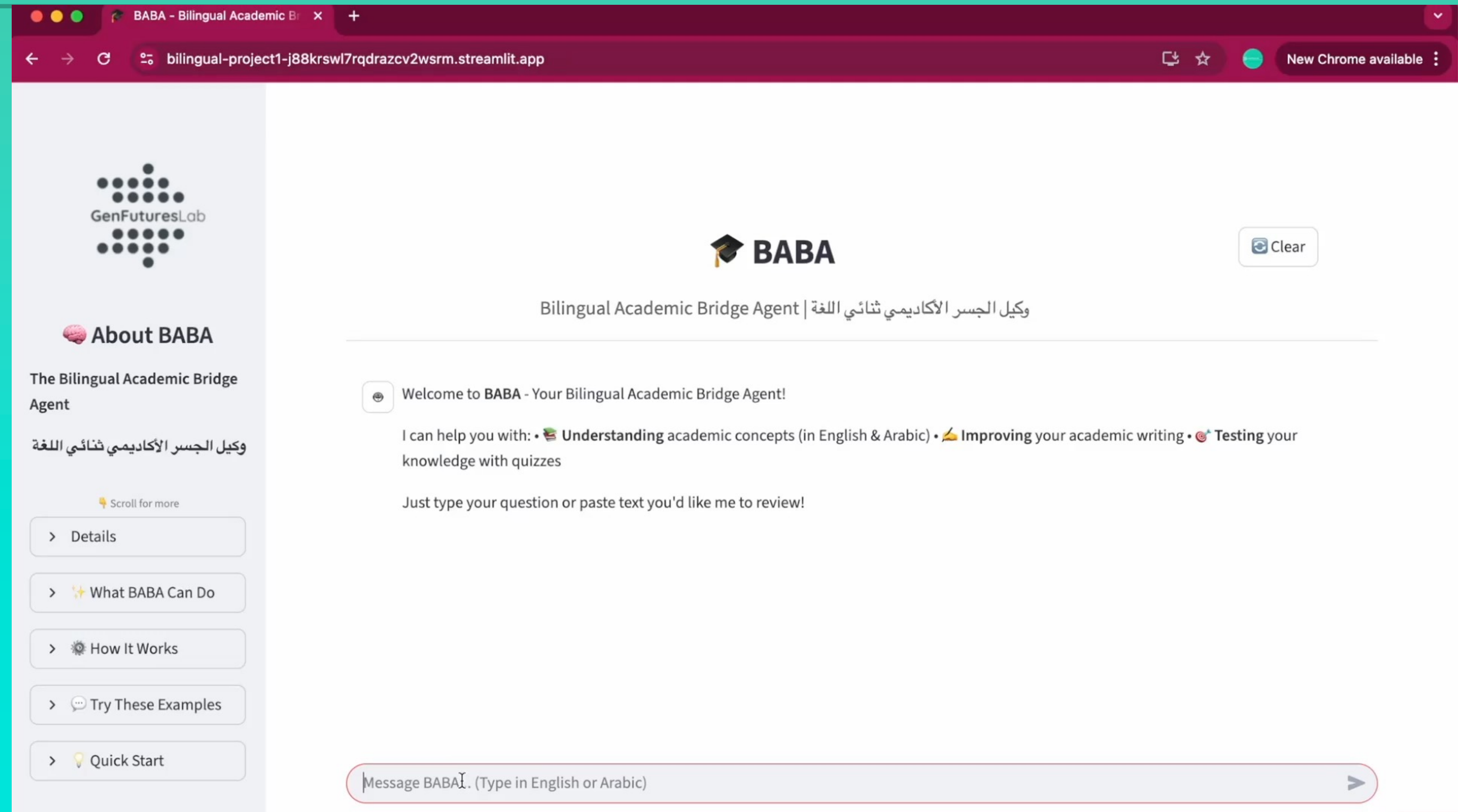
The challenge

Students think in their native language but study in English. They need clearer explanations and personalised assistance to improve academic writing.

Solution

What the agent does

- Explains concepts in English and Arabic with Gulf-relevant examples
- Upgrades drafts to academic English while giving Arabic feedback
- Suggests next steps and quick self-checks



Virtual Competitive-Analysis Team

Mult-agent System – built by GenFutures Lab , 2025

Challenge

Spin up a virtual team to run a thorough competitor analysis of senior-living providers in Australia and produce a clear report the client can use and extend.

Solution

A configurable multi-agent system with an orchestrator and three specialist agents:

Data Collector

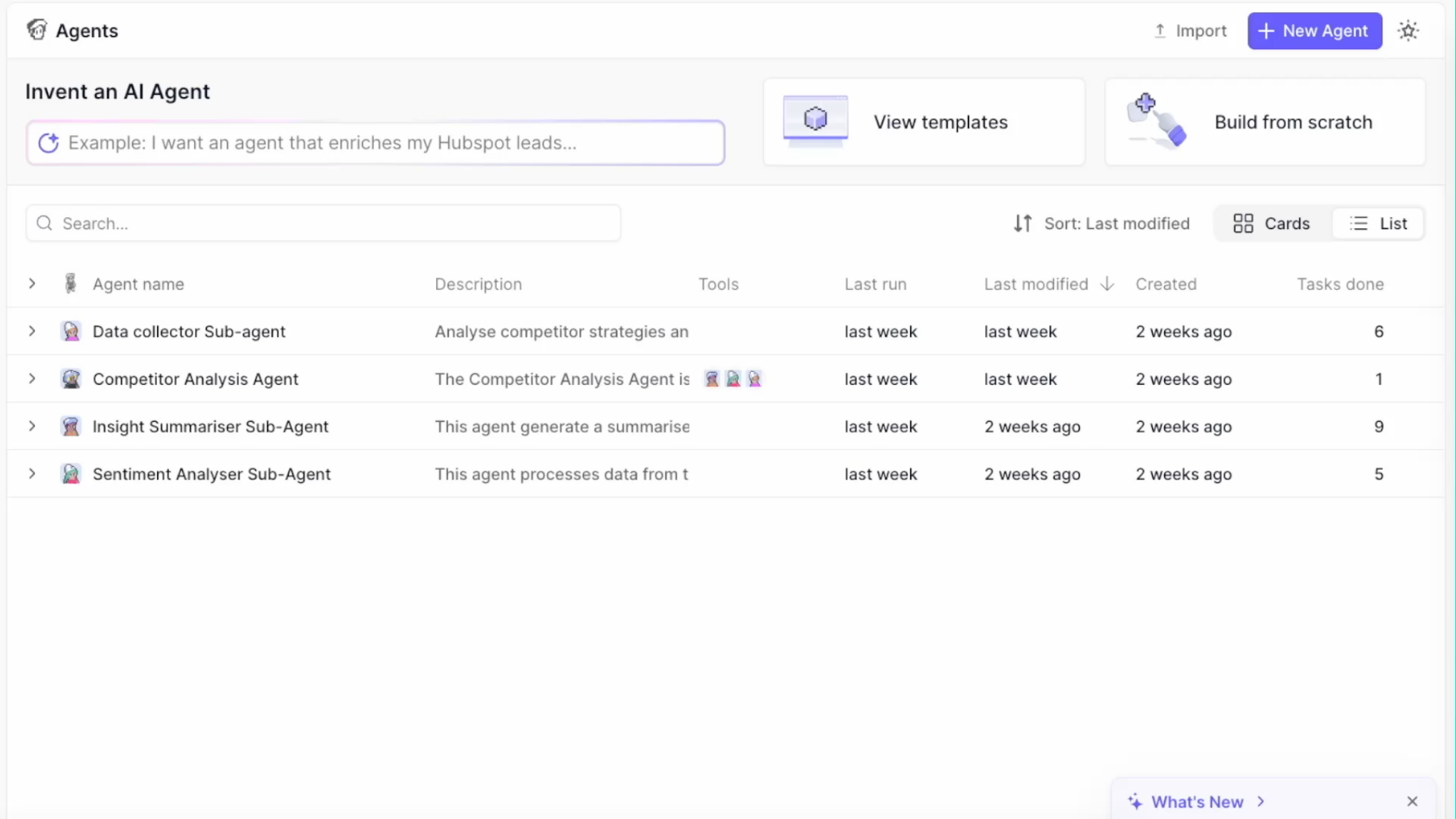
Gathers pricing pages, product features and public reviews.

Sentiment Analyser

Extracts themes, sentiment and issues from senior residents reviews.

Insight Analyser

compares offers, flags differentiators and risks.



Results

- A repeatable workflow that can be run, modified and extended with additional agents.
- A structured report with sources, evidence snippets and charts in less than an hour (not weeks).

How do you Build One?

From Complex to Simple

Simple

A single custom GPT in ChatGPT. One agent, one role, one task. No coding.

Intermediate

Custom GPTs with uploaded knowledge bases and web browsing.

Advanced

Multi-agent systems with orchestrators and specialist roles.

Step 1: Plan Before you Build

GOAL	INPUTS	OUTPUTS
What's the purpose? EXAMPLE <i>Welcoming new volunteers and walking them through their first day.</i>	What does the GPT need? EXAMPLE <i>Volunteer's name, role they signed up for, start date.</i>	What should it produce? EXAMPLE <i>A warm welcome message, three first-day expectations, list of contacts.</i>

Our First Agent

GOALS, INPUTS, OUTPUTS DEFINED

A

CHAT-BASED

Volunteer Welcome Assistant

GOAL

Welcome new volunteers and walk them through their first day.

INPUTS

Volunteer name, role, start date.

OUTPUTS

Warm welcome message, what to expect, three first-day expectations, list of contacts.



Let's Build Another One

GOALS, INPUTS, OUTPUTS DEFINED

B

MANUAL CONFIG

Funder Fit Check Assistant

GOAL

Help nonprofits assess whether a funding opportunity is worth pursuing before applying.

INPUTS

A funding opportunity (URL or pasted requirements) and a short description of the organisation.

OUTPUTS

Eligibility checklist, fit rating (Strong / Partial / Weak), gap analysis, recommended next steps.



The Building Blocks of your Agent

ONE REUSABLE TEMPLATE · SEVEN ELEMENTS

Custom GPT configuration · Instructions field

ROLE

You are [name], a [role] that helps [audience] achieve [outcome].

CORE BEHAVIOUR

Stay focused on one task. Keep responses brief and practical.

OUTPUT

Structure every answer as: [Summary, Key steps, Details, Sources].

TOOLS

Browse the web when [conditions]. Avoid when [conditions].

RULES

(Your guardrails)

If ambiguous, state assumption and proceed. Verify recent or high-stakes facts.

TRIGGER / ACTION / EXAMPLE

When the user does X, agent does Y. Example: ...

ERROR HANDLING

If a tool fails, explain and proceed with best effort.

How do you Make it Trustworthy?

Why Trust Matters More for Nonprofits

STAKES ARE HIGHER

When a corporation gets an AI output slightly wrong, it might be embarrassing.

When a nonprofit gets it wrong, the consequences go to the heart of your mission.



Sensitive data

You handle beneficiary records, donor histories, and confidential community information.



Funder credibility

A fabricated statistic in a grant application can damage years of relationship building.



Mission trust

Your community trusts you. A tone-deaf or careless AI output can erode that quickly.

Key Principles for Building Trusted AI Agents

Ethical Foundation



Accountability - traceable decisions



Fairness - eliminate bias



Transparency & Explainability

Human Alignment



Human Agency and Oversight



Privacy - protect data and users

Technical and Societal Integrity



Safety – technical robustness and fallback



Social and environmental Responsibility



*Adapted from Papagiannidis, E., Mikalef, P., & Conboy, K. (2025). Responsible artificial intelligence governance: A review and research framework. Journal of Strategic Information Systems, 34, 101885.

How to Operationalise Trust

WITHOUT AN IT DEPARTMENT

STRUCTURAL

Who owns trust

- Name one person responsible for reviewing AI outputs.
- Set clear rules about what the agent can and cannot do.

PROCEDURAL

How trust is maintained

- Test every agent with at least three different inputs before launch.
- Review outputs regularly, not just at launch.
- Document what data the agent can see.

RELATIONAL

How trust is sustained

- Get feedback from your team and stakeholders
- Build AI literacy across your organisation

Three Questions Before you Deploy any Agent

YOUR MINIMUM GOVERNANCE

1

What can go wrong?

AI can hallucinate facts, get the tone wrong, or miss context. Know the risks before you start.

2

Who checks the work?

Every agent output should be reviewed by a human before it reaches anyone external.

3

What data is it seeing?

Be clear about what information you're sharing with the AI and whether it's appropriate.

Print these three questions. Use them every time, before any agent goes live.

Where Should you Start?

Key Takeaways and Next Steps

92% of nonprofits use AI, but only 7% see major organisational impact. The gap is workflow, not technology.

01

Start small. Your first AI assistant doesn't need to transform your organisation. It needs to do one repeatable task reliably.

02

Plan before you build. Goal, inputs, outputs. The planning is the work.

03

Embed it in workflows. The 7% with major impact treat AI as a team capability, not a personal shortcut.

04

Three questions before you deploy: What can go wrong? Who checks the work? What data is it accessing?



Where to Start this Week

YOUR LOWEST-RISK STARTING POINT

Pick one safe use case from the list below. Then:

- 1 Define the goal, inputs, and outputs
- 2 Write the instructions using the config template from today's session
- 3 Build it in ChatGPT (Plus, \$20/month)
- 4 Test it at least three times with different inputs

SAFE FIRST USE CASES

Volunteer FAQ · Donor thank-you drafts · Event checklists · Social media captions · Board meeting briefs (first draft)

ALWAYS KEEP HUMAN-LED

These are categorically high-risk.
Not stepping stones to automate later.

- Safeguarding decisions
- Eligibility decisions
- Legal, medical, or financial advice
- Sensitive personal data
- Anything that sends messages automatically without review

Thank You

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