Resource
Mobilization for
Civil Society
Organizations
in a Digital Context

Session #5

AI to Transform NGOs:
First Steps Toward Efficiency and Impact

2025

1.   Introduction

This workshop, "AI to Transform NGOs: First Steps Toward Efficiency and Impact," is designed for CSO staff and leaders who want to understand and apply Artificial Intelligence in their daily work. Conceived as a culminating session following modules on Strategy Screening, donor relations, and proposal writing, this workshop seeks to apply AI directly to the challenges and tasks identified in previous sessions.

While fundamental concepts will be covered to establish a common foundation, the main focus of the workshop is eminently practical and adaptive. The intention is for this to be as interactive a session as possible, allowing participants to use AI to develop their skills, honing in on specific topics that most interested or challenged them previously. For example, practical activities may focus on how to use AI to analyze a donor's alignment, generate drafts for a proposal section, or even simulate a conversation in preparation for a meeting, depending on the needs of the group.

The guiding principle is Incremental AI: the use of simple, low-risk tools to achieve significant improvements in efficiency. A key component will be learning effective prompting through the TCEEI (Task, Context, Examples, Evaluate, Iterate) framework, along with essential guidelines for safe and ethical use of the technology.

By the end of the workshop, participants will not only understand the basics of AI, but will have practiced its application in real tasks relevant to their resource mobilization cycle, taking away a set of practical skills to start working more efficiently.

4. Session Script: AI to Transform NGOs (90 minutes)

Minute	Slide Number	Facilitator Activity/Action	Key Technical Content	Strategy/Methodology	Notes for facilitation
0-5	1-4	Welcome participants and present the adaptive objectives of the session. Ask an icebreaker question: "In one word, what do you hope to achieve with AI in your work?"	Session objectives. Emphasis on practical and personalized application.	Explanation + Visual framing + Icebreaker activity.	Make it clear from the outset that the session will be very practical and will be tailored to the interests of the group, based on the previous modules.
5-20	5, 6	Explain the fundamental concepts concisely: Incremental AI (and why it is relevant), types of tools, and key benefits for CSOs.	Incremental AI. Types of tools. Direct benefits for the sector.	Conceptual presentation with examples.	Keep this section brief. The goal is to provide the language and context necessary for the practical part.

Minute	Slide Number	Facilitator Activity/Action	Key Technical Content	Strategy/Methodology	Notes for facilitation
20-30	7, 8	Present the "rules of the game": guidelines for safe use and the TCEEI prompting framework. Give a quick 3-4 minute demonstration to illustrate how a good prompt improves the result.	Safe and responsible use. TCEEI framework for effective prompts.	Conceptual presentation + live demonstration.	The demonstration is key to preparing the group for success in the practical activities that will follow.
30-35	9	Survey and Activity Selection: Facilitate the interactive survey using Slide 9. "Based on what we have seen, which practical task would you prefer to focus our time on?" Write down the answers.	Co-creation of the workshop agenda. Adaptive workshop.	Interactive survey/chat voting.	Be prepared to facilitate one in-depth activity (~35-40 min) or two shorter ones (~15-18 min each). Gauge the group's energy and interest to decide.
35-75	10, 11, 12	Adaptive Practical Workshop: Facilitate the activity(ies) selected by the group. Use slides 10, 11, or 12 as a basis for instructions. Divide into small group rooms and hold a debriefing at the end.	Practical application of AI in tasks relevant to CSOs (writing, planning, etc.).	Practical group work / Learning by doing + Sharing.	Manage time actively. If two activities are chosen, be very strict with the time limits. Circulate around the rooms to help groups refine their prompts using the TCEEI framework.
75-85	13, 14, 15	Discussion of Concerns: Use Slide 13 to ask about their concerns. Address key points (errors, biases, privacy) by connecting them to the experience they just had in the activity.	Managing risks and ethical concerns in practice.	Guided reflective dialogue.	Connect abstract concerns to practical experience. Ask: "Did anyone notice that the AI invented a fact or showed any bias in its response?"
85-90	N/A	Quickly summarize key points and suggested next steps (experiment, discuss guidelines, etc.). Open for 1-2 final questions and close the session.	Recap. Actionable next steps.	Summary + Open dialogue (Q&A) + Closing.	The goal is for people to leave with the confidence and tools to start applying these techniques in their own work immediately.

Activity 1: Writing an Impactful Executive Summary with AI

- **Objective:** To practice using AI to generate a first draft of an executive summary for a project proposal and refine it collaboratively.
- **Time:** 20 minutes (5 min explanation, 10 min group work, 5 min sharing)
- **Tools:** Small group rooms, shared document, access to an AI tool, description of a fictional project (e.g., "NGO 'Bright Future' seeks funding for an after-school tutoring program for at-risk youth in community X, focused on improving academic performance and social-emotional skills. Duration: 1 year. Budget: $50,000.").
- **Instructions for the facilitator:**
    1. **(Explanation - 5 min):** "We are going to use AI to generate a draft executive summary. In groups, you will use an AI tool to write a ~150-word summary for a fictional project. Ask the AI to act as an 'expert NGO proposal writer' and then refine the result using the TCEEI framework."
    2. **(Small Group Work - 10 min):** Divide into groups of 3-4. One person in the group interacts with the AI. Tasks: 1) Create the initial prompt and generate the draft. 2) Discuss and refine the prompt at least once. Paste both drafts into the document.
    3. **(Sharing - 5 min):** A volunteer group shares their initial prompt, what they changed, and the result. The role of AI as a starting point that requires human refinement is highlighted.

Activity 2: Developing SMART Program Objectives with AI

- **Objective:** Use AI to transform general program goals into SMART objectives (Specific, Measurable, Attainable, Relevant, Time-bound).
- **Time:** 20 minutes (5 min explanation, 10 min group work, 5 min sharing)
- **Tools:** Small group rooms, shared digital whiteboard, access to an AI tool, general program goal (e.g., "Improve food security for 100 farming families in region Y").
- **Instructions for the facilitator:**
    1. **(Explanation - 5 min):** "Moving from a general goal to SMART objectives can be challenging. In your groups, you will use AI to generate 2-3 SMART objectives from a general goal that I will give you. In your prompt, explain to the AI what a SMART objective is."
    2. **(Small group work - 10 min):** Divide into groups. Task: Formulate the prompt, interact with the AI, and select/refine 2-3 SMART objectives. Write them on your shared whiteboard.
    3. **(Sharing - 5 min):** Spokespersons share one SMART objective generated. Reinforce that AI helps with structure, but the NGO's contextual knowledge is key to validating relevance.

Activity 3: Creating a Detailed Program Timeline with AI

- **Objective:** Experiment with the IA to generate a structured timeline for a project.
- **Time:** 20 minutes (5 min explanation, 10 min group work, 5 min sharing)
- **Tools:** Small group rooms, shared document, access to an AI tool, list of 3-4 main activities and total duration (e.g., "Clean Water for All" project, 6 months. Activities: 1. Community assessment. 2. Well construction. 3. Hygiene training. 4. Monitoring).
- **Instructions for the facilitator:**
  1. (Explanation - 5 min): "AI can help us break down activities and estimate times for a schedule. Ask the AI to generate a monthly schedule, break down each activity into sub-tasks, suggest durations, and present it in table format."
  2. (Small group work - 10 min): Divide into groups. Task: Interact with the AI and analyze the generated schedule. Is it realistic? Copy the table into the document.
  3. (Sharing - 5 min): Spokespersons share a section of their schedule. Emphasize that AI generates a good structure, but the project team's experience is crucial for validating durations and dependencies.

One-Page Summary Guide: AI for NGOs
AI for NGOs: Quick Guide to Getting Started with Impact

What is AI (and why is Incremental AI for IT)?
- Artificial Intelligence (AI): Computers mimicking human intelligence.
- Generative AI (GenAI): Creates new content (text, images, ideas). It's like a super-advanced assistant!
- Incremental AI: Practical and accessible use of AI to improve daily work, gain efficiency, and reduce burnout. You don't need to be a tech expert to get started!

Why Use AI in Your NGO?
- Save Time: Automate repetitive tasks and summarize information.
- Improve Quality: Help with writing, generating ideas, and analyzing data.
- Empower Staff: Reduce burnout and allow staff to focus on higher-impact tasks.
- Get Involved: Understand and contribute to the conversation about the future of work.

The Art of Prompting: How to Communicate with AI
A "prompt" is the instruction you give to AI.
- **TCEEI Framework for Detailed Prompts:**
  - **TASK:** What do you want? (Be specific: format, audience).
  - **CONTEXT:** Why? Objectives?
  - **EXAMPLES:** Show 1-2 examples of what you are looking for.
  - **EVALUATE:** Is the response useful, accurate, unbiased?
  - **ITERATE:** Adjust and try again. The first answer is rarely perfect!

Key Guidelines for Responsible and Safe Use:
1. Experiment, but with Care: Encourage learning.
2. Protect Sensitive Data: NEVER use personally identifiable information (PII) from beneficiaries in public tools.
3. You Are Responsible: Review and validate ALL AI-generated content. The final quality is yours.
4. Always Human Oversight: AI is a tool; it does not replace critical judgment.
5. Be Transparent: Report internally if you use AI significantly.
6. Beware of biases: AI can reflect existing biases. Demand diversity and equity in results.

Steps to Get Started in Your NGO:
1. Experiment Individually: Spend 1-2 hours/week on a general-purpose tool (ChatGPT, Claude, Gemini).
2. Define Internal Guidelines: A small group can draft a provisional policy.
3. Basic Training: Offer an introduction to all staff.
4. Encourage Peer Learning: Create spaces to share experiences, successes, and failures.