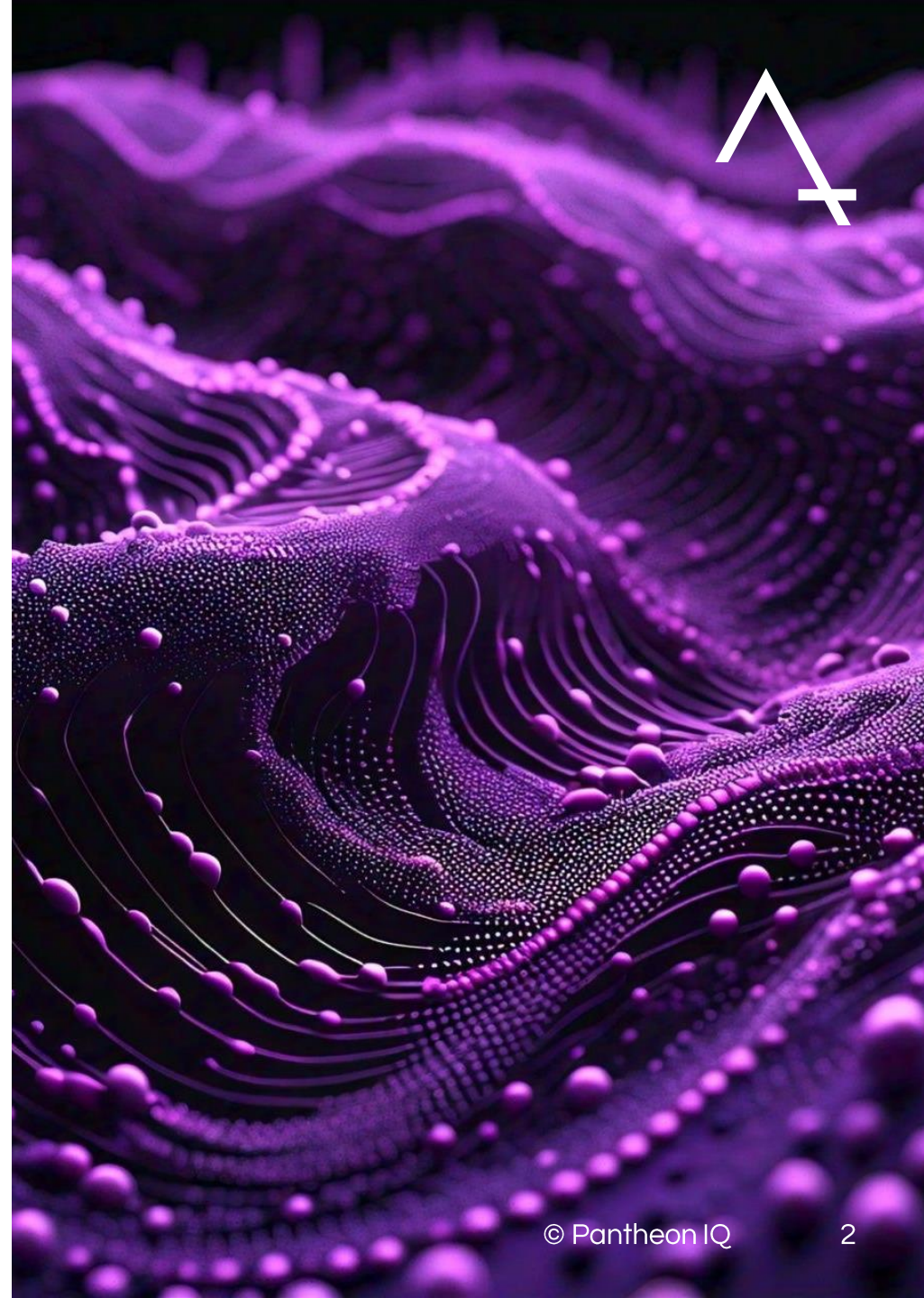


Leveraging AI for Impact

Productivity enhancement for not-for-profit organisations

Agenda

- About us
- Challenges
- Solutions
- Artificial Intelligence
- Process Automation
- Governance
- How to get started
- Q&A



Pantheon IQ



Unlocking your potential with Artificial Intelligence and Automation

Pantheon IQ empowers small and medium-sized businesses and non-profits with cutting-edge IT consulting services, focused on **AI, AUTOMATION, DATA, ANALYTICS** and **GOVERNANCE**

By providing advice and innovative solutions, we help clients harness technology to drive efficiency, make informed decisions, and unlock their full potential in today's digital landscape.

We are committed to collaboration, integrity, and client-centricity, delivering tailored solutions that enable our clients to thrive and succeed.

Pantheon IQ



Unlocking your potential with Artificial Intelligence and Automation



Warren Beard – CEO

warren.beard@pantheoniq.com

Warren Beard has worked in professional services for over two decades. His expertise includes Data and AI, Robotic Process Automation, and Business Transformation. He currently serves as an Adjunct Lecturer in Information Systems at the Auckland Institute of Studies and is pursuing a Doctorate in Artificial Intelligence at the University of Otago.



Sam Pankhurst – CTO

sam.pankhurst@pantheoniq.com

Sam has worked in professional services for over 30 years, covering Digital Transformation, Process Automation and Business Transformation. He specialises in enhancing clients' business processes, using technologies such as AI and automation, to deliver customer-centric operational excellence. Sam is a Chartered Engineer and Six Sigma black belt.

Sector Challenges



1 Funding and Financial Stability

Revenue Diversification: Many nonprofits rely heavily on a few sources of income, such as grants, donations, or government funding.

Fundraising Challenges: Competing for donations and grants can be difficult, especially during economic downturns.

2 Resources Constraints

Human Resources: Nonprofits often operate with limited staff and rely heavily on volunteers.

Technological Resources: Limited budgets can prevent nonprofits from investing in necessary technology.

3 Governance and Leadership

Board Engagement: Ensuring active and effective board involvement can be challenging.

Leadership Transition: Succession planning for key leadership positions is often lacking, which can cause disruptions during transitions.

4 Measuring Impact

Impact Assessment: many nonprofits struggle with measuring and reporting their outcomes.

Accountability: Ensuring transparency and accountability in operations and finances is essential but can be resource-intensive.

5 Regulatory and Compliance Issues

Legal Requirements: Navigating the complex web of regulations and compliance requirements can be challenging

Reporting Obligations: Reporting standards for donors, grantors, and government agencies requires meticulous planning and coordination.

6 Competition and Collaboration

Collaborative Efforts: While collaboration can lead to greater impact, aligning goals and resources with other organisations can be difficult.

Competition for Resources: Nonprofits often compete for the same funding, volunteers, and other resources.

7 Public Perception and Trust

Building Trust: Maintaining public trust is essential, and any scandal or mismanagement can significantly damage a nonprofit's reputation.

Awareness and Visibility: Gaining visibility in a crowded sector can be difficult, making it hard for nonprofits to reach potential donors.

8 Adapting to Change

Market Changes: Economic shifts, changes in government policies, and evolving community needs require nonprofits to be flexible.

Innovation: Embracing new approaches and technologies can be challenging but is necessary for staying relevant and effective.

Current Challenges



AUSTRALIAN CHARITIES REPORT - 10TH EDITION

5 June 2024

Cost of living increases impact charities

Our data shows that cost of living issues had an impact on charities in 2022, with increases in expenses and liabilities outpacing increases in revenue and assets (in percentage terms).

Total revenue in the sector increased by \$11 billion to a record high of just over \$200 billion, but expenses increased by \$22 billion in the same period.

Employee expenses also rose dramatically. The amount charities spent on employees in 2022 increased nearly 10% when compared to 2021 – the highest annual percentage increase recorded.

[Australian Charities Report - 10th edition | ACNC](#)

ABC NEWS

Charities struggle to survive rising costs, increasing demand, dwindling resources

By national regional reporter Jess Davis

Posted Sat 22 Apr 2023 at 8:15am



Many people are seeking out food relief for the first time as a result of the rising cost of living. (Supplied: Foodbank Australia)

More people are turning to charities for help as the cost of living rises, but the increased demand for services is not being met with more funding or resources.

[ABC News article - April 2023](#)

PARLIAMENT of AUSTRALIA

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Chapter 3 - The impact

The experience of Australian households and the not-for-profit sector

- 3.1 For many Australian households, mounting cost of living pressures have come on the back of years of hardship and economic pain resulting from the COVID-19 pandemic. The committee has heard that the cost of living crisis is driving new cohorts of people—many with solid incomes and stable jobs—to seek support just to make ends meet.
- 3.2 Across the board, not-for-profit organisations widely drew a correlation between growing cost of living pressures and increased demand for their services.^[1] However, much of the evidence before the committee suggests that different groups are experiencing cost of living pressures differently, although already disadvantaged cohorts remain at risk and in need of support.^[2]

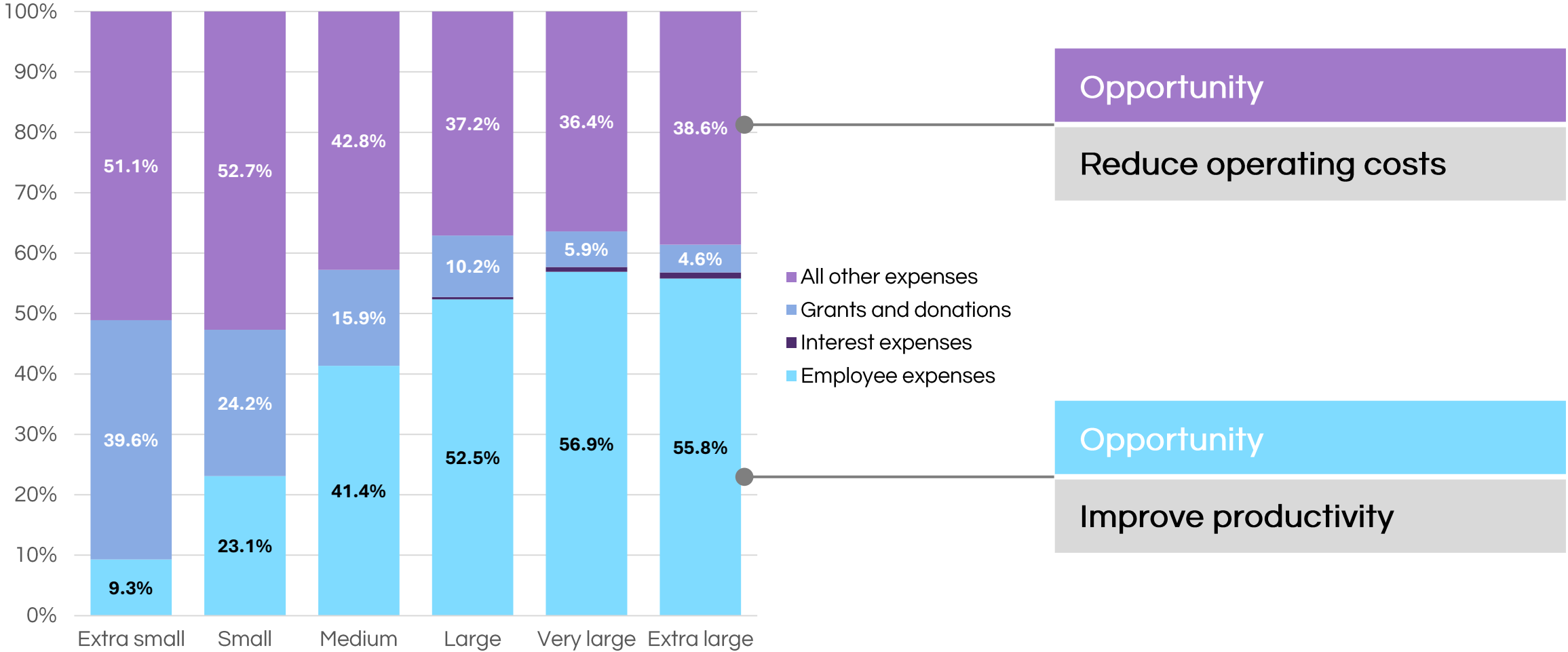
Interim committee findings

Finding 4: The cost of living crisis is causing an increase in the demand for services provided by the charitable and not-for-profit sector.

Finding 5: As demand for charitable services increases, there is a parallel downturn in the ability of charities to meet this demand due to increased overheads for these organisations and lower levels of charitable giving.

[Parliament of Australia Select Committee on Cost of Living - Interim Report May 2023](#)

Prioritising Operating Costs and Productivity



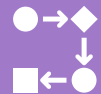
Australian Charities Report 10th edition: Charity Data Explorer | ACNC

Addressing the challenge



- Lean techniques to minimise effort, reduce cost, and improve employee/citizen experience

Process Improvement



- Avoid duplicated functionality
- Maximise use of existing functionality
- Avoid manual synchronisation effort between systems

System Rationalisation



- Generative AI to improve productivity, creativity and content generation
- Automate regular mundane activity to reduce admin overhead

AI & Automation



- Harness internal and external data to inform and improve offerings and decision making

Data & Analytics



- Maximise supplier non-profit offers and discounts
- Licence rationalisation
- Hardware strategy review

Procurement



AI Impact by Function



Program delivery

Communicate policies and draft job descriptions.

Create stunning training materials.

Easily respond to beneficiary or staff emails.

Marketing

Identify relevant market trends and segments.

Create the first draft for a campaign.

Summarise campaign results with powerful visuals.

Fundraising

Have better donor conversations and boost major gifts.

Create donor presentations and proposals.

Analyze donor data from previous quarters.

IT

Create a project plan for a product roll-out.

Stay up to date on various project calls and chats.

Identify patterns in data and solve issues faster.

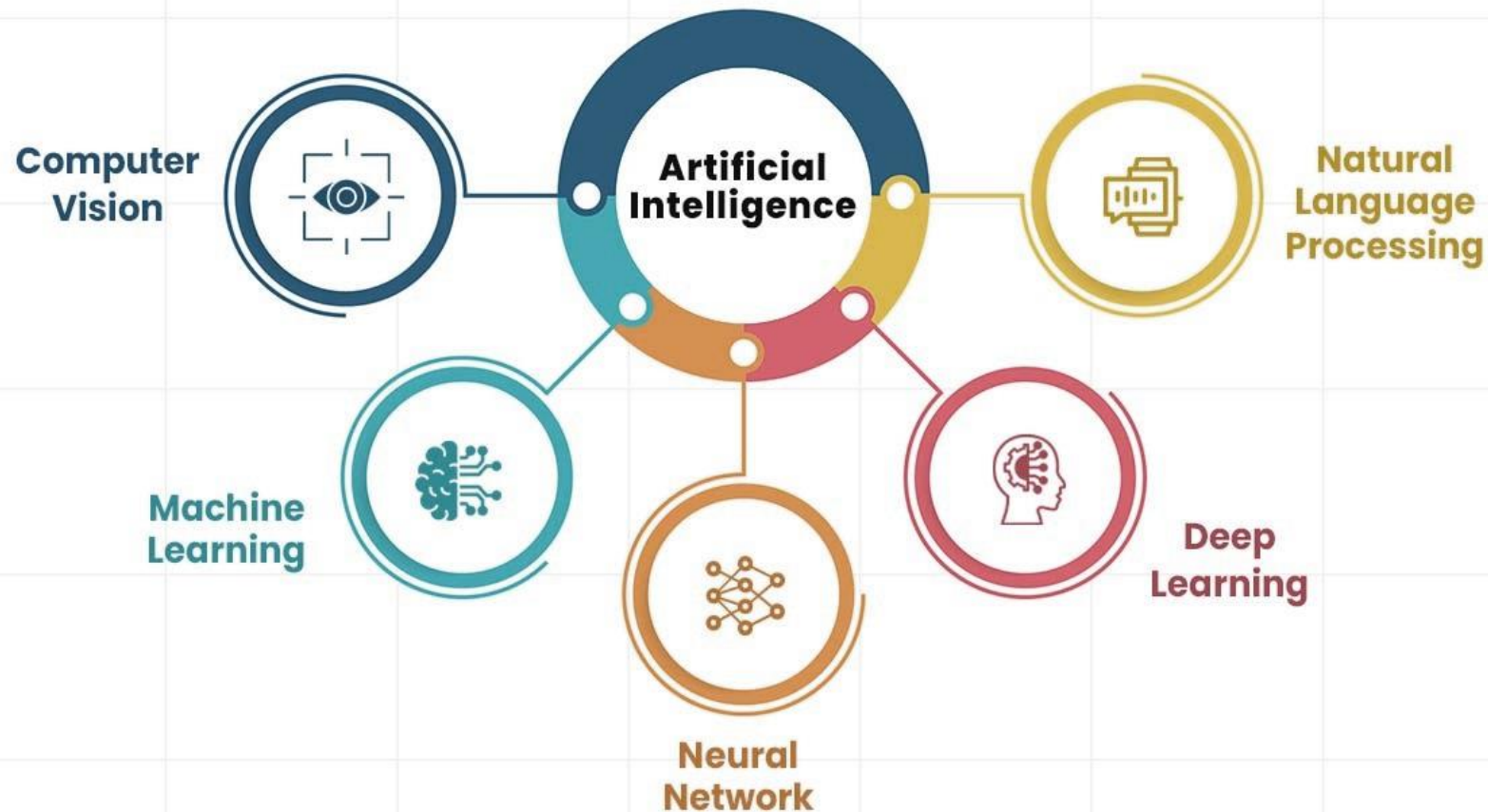
Finance

Simplify financial reporting and planning.

Identify performance improvements.

Report metrics using professional charts.

Artificial Intelligence

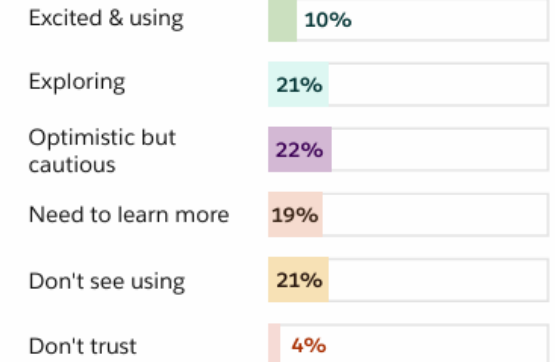


Leveraging AI for impact

AI Perceptions



Most AUS nonprofits are in an exploratory and learning phase with AI but see a future for AI within their org. 1 in 5 orgs say they don't see themselves using AI.



Top Generative AI Concerns

- 50% Data Security
- 49% Data Privacy
- 39% Loss of human expertise/jobs
- 32% Accuracy

Top AI Use Cases

- 26% Org wide efficiency
- 26% Content Creation
- 23% Marketing Copy
- 16% Participant/Service user case summaries

Copilot for Microsoft 365



 Copilot in Word

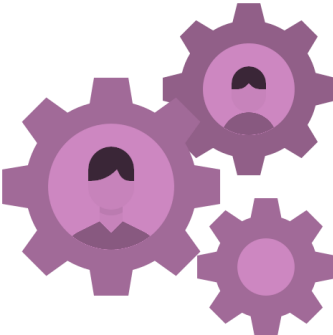
 Copilot in Excel

 Copilot in PowerPoint

 Copilot in Teams



77% of Copilot for Microsoft 365 users said that once they started using it, they didn't want to give it up.

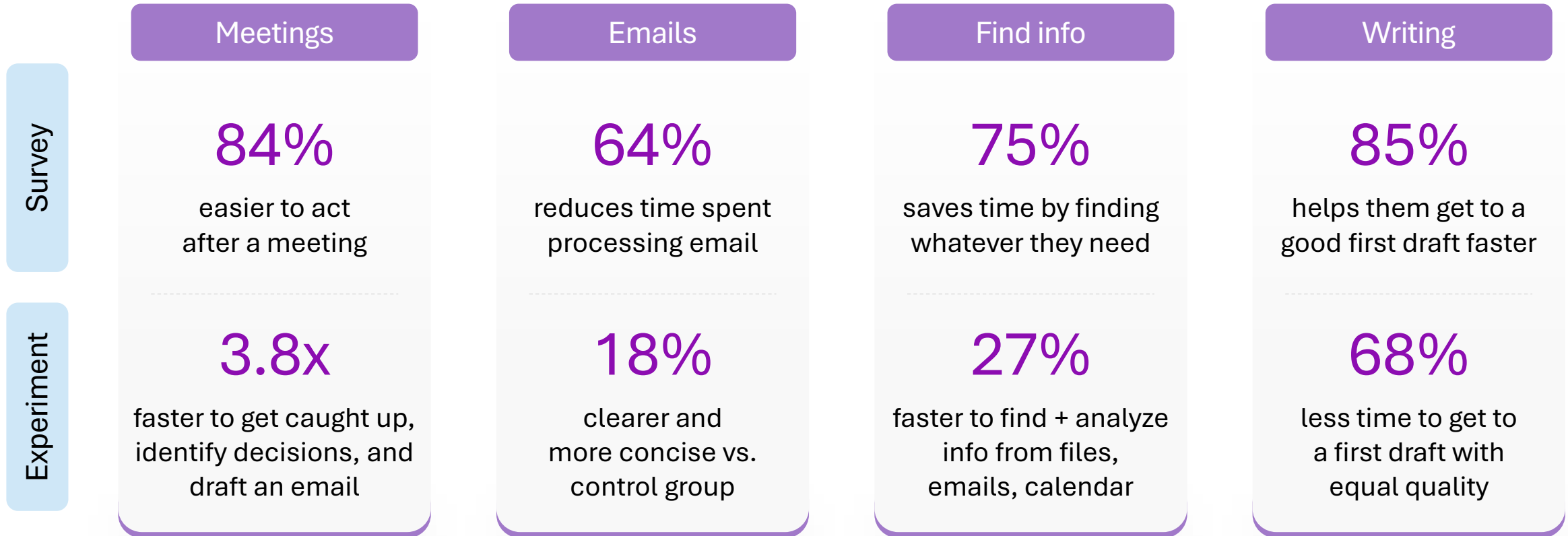


70% of Copilot for Microsoft 365 users said they had become more productive.



68% of Copilot for Microsoft 365 users said the quality of their work improved.

Benefits of Copilot



Qualitative source: Survey of Copilot for Microsoft 365 Early Access Program users, October 2023.

Quantitative source: Microsoft Office of the Chief Economist, October 2023, "A Day in the Life Study."; Microsoft Internal Research Team, October 2023, "The Missed Meeting: Evaluating Copilot's Effectiveness in Teams." Microsoft Office of the Chief Economist, October 2023, "The Strain of Searching Study."



Arapahoe Libraries advances equity and innovation with Copilot for Microsoft 365

Customer: Arapahoe Libraries

Country: United States

Industry: Nonprofit

Publish date: June 2024

Size: 50 - 999 employees

[Read the full story here](#)

“Libraries are at the center of knowledge and innovation for the communities we serve. Technology is part of that. We believe AI is an everybody tool.”

— Anthony White, Director of Innovation and Technology, Arapahoe Libraries

Challenge: Arapahoe Libraries serves 655,000 residents in Colorado but, like many public institutions, has to do a lot on a limited budget. The library district aimed to increase employee productivity and collaboration while staying at the forefront of technology.

Solution: Arapahoe Libraries adopted Copilot for Microsoft 365. Querying the AI assistant to find conversations, messages, and documents saves employees time they can redirect toward serving the community. They also use the tool to rewrite documents and emails to reflect the organization's tone and values. Queries also identified ways to better protect patrons' privacy.

Impact: Efficiencies enabled by Copilot for Microsoft 365 free up staff to creatively serve patrons. For example, using Copilot to locate PII in internal files saved Arapahoe Libraries an estimated six months. The library district plans to expand its use of Microsoft Copilot to analyze data, generating insights leadership can use to direct resources where they are most needed.

Products: Copilot for Microsoft 365

Process Automation

- Uses software 'bots'
- Ideal for structured, rule based, repetitive tasks that involve a high level of human processing, but little cognitive effort
- Frees up staff to work on more useful and interesting work
- Increased speed, accuracy, consistency
- Improved quality and scalability
- Reduced cost to serve



Example use Cases

- 1 Data entry & processing
- 2 Streamlining workflow & approvals
- 3 Email management
- 4 Integrating with other tools
- 5 Customer service processes
- 6 HR processes
- 7 Generating reports & analytics
- 8 IT processes (e.g. password reset)
- 9 Internal & external communication
- 10 Inventory & freight management

Microsoft Power Automate



Microsoft Power Platform



The world's most complete set of integrated, low-code development tools



Power Apps
for
web and mobile
application
development



Power Automate
for
process
or workflow
automation



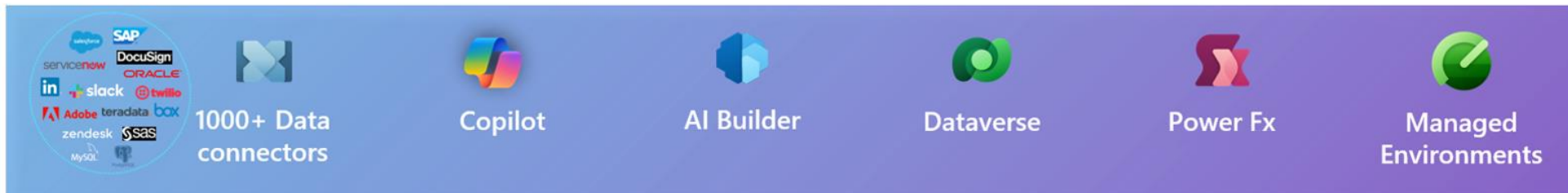
Power Virtual Agents
for
customizing
Microsoft Copilots
or building your
own copilot



Power Pages
for
building secure,
data-centric
business websites



Power BI
for
data exploration,
analytics and
reporting





 [Read full story here](#)

Customer:

Leonard Cheshire

Partner:

QuantiQ

Industry:

Nonprofit

Size:

Large (1,000 – 9,999 employees)

Country:

United Kingdom

Products and services:

- Azure
- Dynamics 365 Customer Service
- Dynamics 365 Finance
- Power Apps
- Power Automate
- Power BI



“We’ve identified a lot more ways that we can make a difference using Dynamics 365 and the Microsoft Power Platform,” says Crandley. “We’re now using them to improve our financial operations, with customer relationship management and compliance monitoring capabilities to follow in the next few months.”

— Laura Crandley, Executive Director of Partnerships, Leonard Cheshire

Situation:

Leonard Cheshire supports thousands of people with disabilities by providing services that help them to live, learn, and work independently. To do this, the nonprofit was relying on numerous disparate systems and manual processes. It wanted to transform its digital technology to streamline operations and create better outcomes.

Solution:

QuantiQ is transforming Leonard Cheshire operations using a blend of Dynamics 365 apps and the Microsoft Power Platform. This complete, cohesive platform for modern, streamlined operations is bringing the organization’s entire digital world together. Staff now work on a common platform with a single view of the information they need.

Impact:

The company is improving management, service delivery, and reporting, while reducing administration and overall costs. An independent ROI study predicted full payback in less than 36 months, and the new technology will better support the services that persons with disabilities need to live more fulfilling, independent lives.

Governance



Risks

- Inaccurate output
- Bias and discrimination
- Data privacy and security
- Ethical risks
- Intellectual property and legal challenges

2024 AI Benchmarking Survey Findings (UK)

- Use of AI in charities has surged, with 60% of individuals now using AI.
- There is little evidence of charitable grant makers investing in AI yet.
- Charities are using a wide range of AI systems, with the most popular being ChatGPT (57%), followed by Copilot (23%) and Gemini (14%).
- On average, half of charities are extremely unprepared in each on the 9 key areas
- Only 1 in 20 is extremely well prepared.
- More than half are extremely unprepared to manage AI risk, including in the key areas of cyber security and data protection.
- By far, what charities most want (27%) is AI to support their fundraising and, to a lesser extent, to reduce the admin burden (24%).
- **What they want help with is integrating AI into ways of working, managing data and understanding what the future will look like.**

[Charity Excellence AI Benchmarking Survey 2024](#)

AI: Seven things you need to get started



- 1 Clear understanding of AI and its benefits for non-profits
- 2 Practical training and workshops ([Collab 365](#))
- 3 Use cases and success stories
- 4 Data security and data privacy confidence
- 5 Integration with existing systems
- 6 Employee trust, assurance and ease of use
- 7 Funding and ROI for adoption and training

[6th Edition Nonprofit Trends Report \(salesforce.org\)](#)

Microsoft Tech for Social Impact



Best value

Microsoft 365 Business Premium (Nonprofit Staff Pricing)

Grant

Free for up to 10 users

NZ\$8.90 user/month
(Annual commitment)

Price does not include tax.

Get started

[Learn more >](#)

Everything in Business Standard, plus:

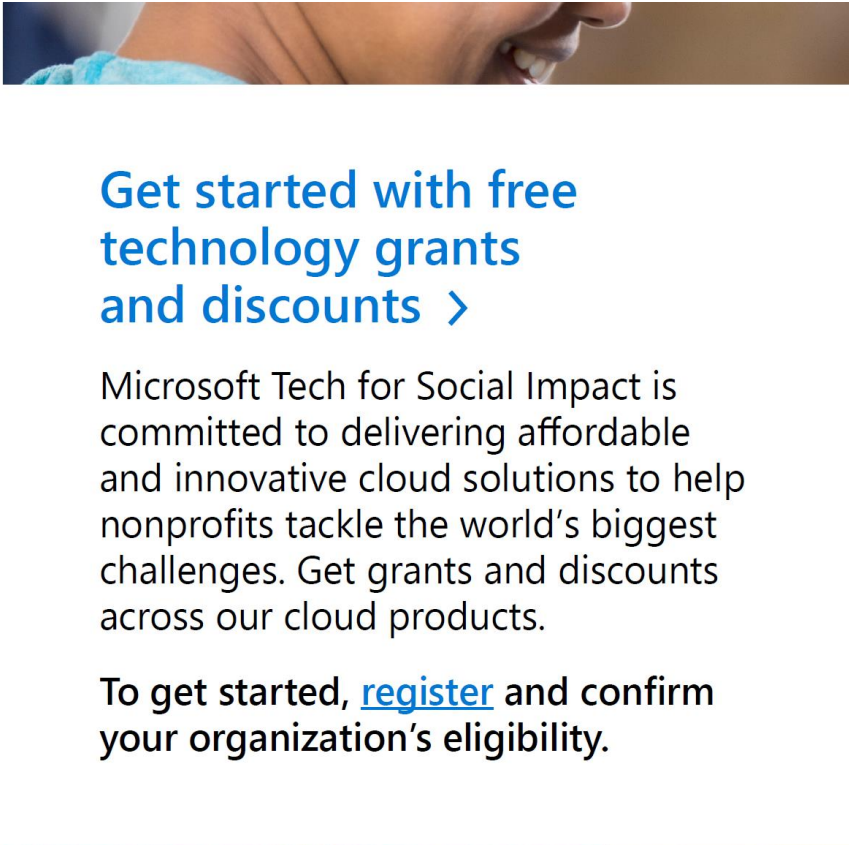
- ✓ Advanced security
- ✓ Cyberthreat protection

Apps and services included

Word	Excel	PowerPoint	Teams
Outlook	OneDrive	SharePoint	Exchange
Access (PC only)	Publisher (PC only)	Intune	Microsoft Purview

[Microsoft Defender for Business](#)

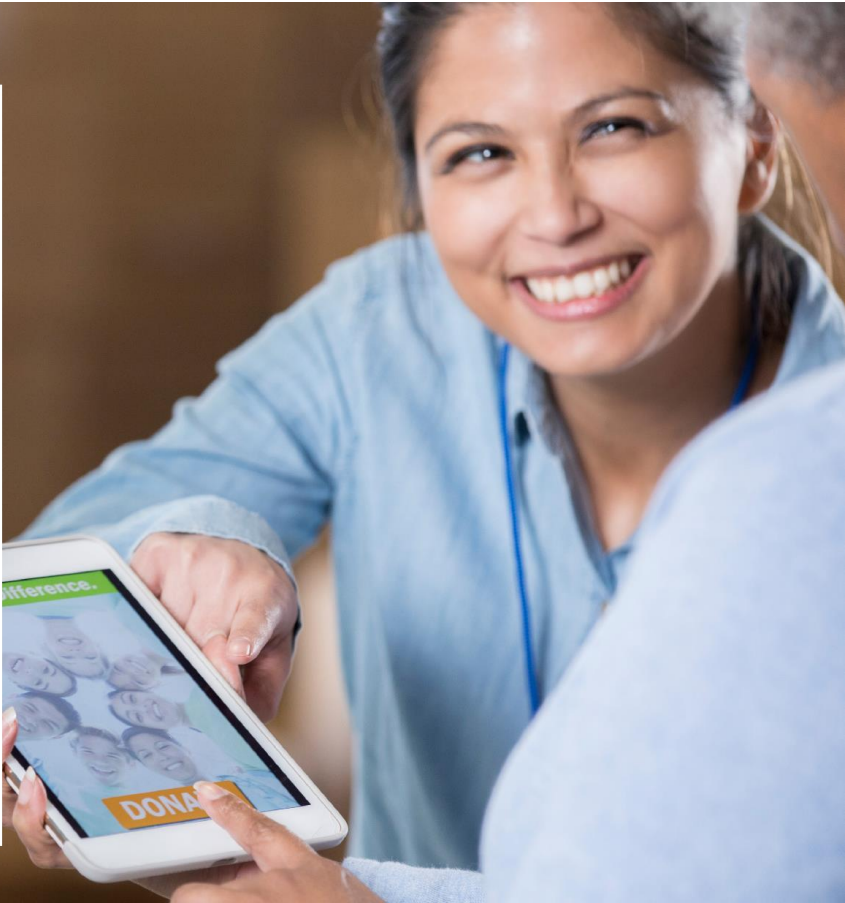
[Technology and software grants and discounts for nonprofits | Microsoft Nonprofits](#)



Get started with free technology grants and discounts >

Microsoft Tech for Social Impact is committed to delivering affordable and innovative cloud solutions to help nonprofits tackle the world's biggest challenges. Get grants and discounts across our cloud products.

To get started, [register](#) and confirm your organization's eligibility.



Discovery Workshop



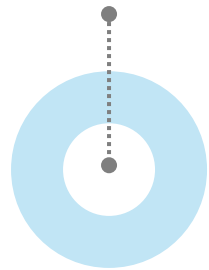
STEP 1:

Understanding Your Business

Business Overview

Pain Points:

Technology Landscape



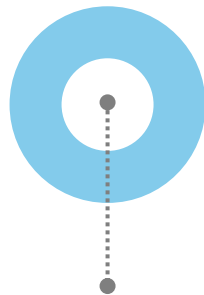
STEP 2:

Identifying Automation and AI Opportunities

Process Mapping

Opportunity Assessment

Feasibility and Impact Analysis



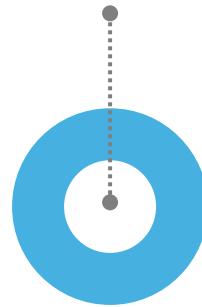
STEP 3:

Technical Deep Dive

Technology Options

Integration Considerations

Security and Compliance

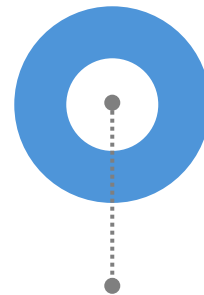


STEP 4:

Success Metrics and Monitoring

KPIs and Performance Metrics

Monitoring and Optimisation

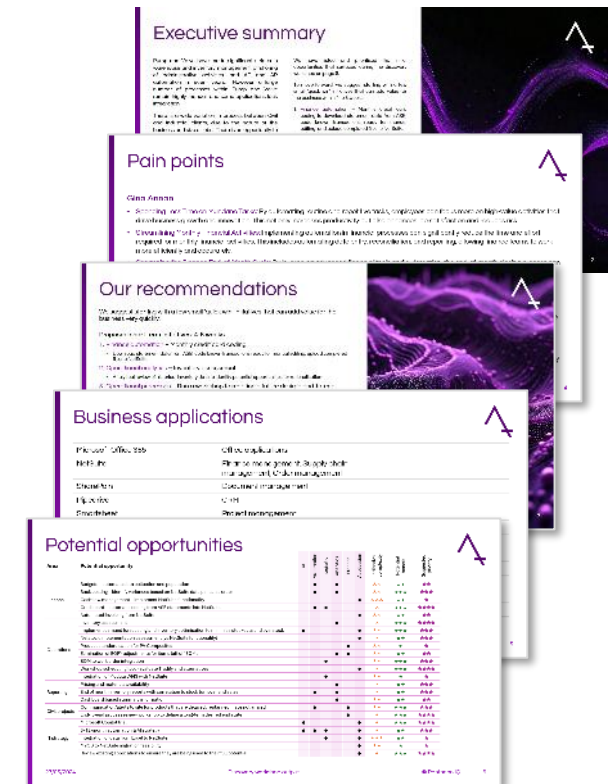
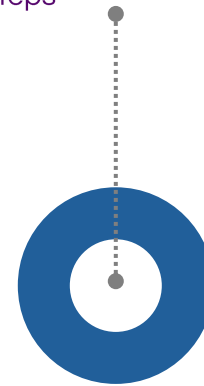


STEP 5:

Q&A and Next Steps

Q&A Session

Next Steps





We're here to help

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Email: sam.pankhurst@pantheoniq.com

Email: warren.beard@pantheoniq.com