

AI for Nonprofits: Getting Started Guide

A practical guide to safe, secure, and responsible AI adoption.



Responsible Generative AI Made Simple for Non-Profit Organizations

Using Generative AI (Copilot, ChatGPT, and similar tools)?

This guide helps non-profits use AI safely, responsibly, and with trust—without building models or handling complex AI systems.

Principles for Responsible AI Use



Human-led, not AI-led



Transparent, fair, and accountable

AI SUPPORTS THE WORK. HUMANS REMAIN RESPONSIBLE FOR DECISIONS.

4 AREAS TO CONSIDER



Internal Governance & Responsibility

What to put in place

- Clear rules on who may use AI
- Clear ownership of final decisions
- Simple guidelines for safe use
- Basic staff awareness or training

If no one owns the outcome; AI should not be used.



Human Involvement in AI-assisted Decisions

How much human review is needed?

- AI outputs are drafts or suggestions
- Sensitive actions must be approved by a human
- Higher impact = more human involvement

Real-world examples

- Emails to stakeholders → human review
- Financial or operational reports → manager check
- Public statements → final human approval



Operations & Risk Management

Use AI safely

- Never enter confidential or personal data
- Watch for bias, harmful language, or exclusion
- Use AI for low-risk support tasks, not judgments about people

Higher-risk uses (extra caution)

- Decisions about individuals
- Health-related assessments
- Performance evaluation



Stakeholder Interaction & Transparency

Build trust through clarity:

- Be open when AI is used in sensitive contexts
- Keep communication simple and understandable
- Allow feedback where possible
- Example disclosure:

“Parts of this content were created with the help of an AI tool and reviewed by our team.”

You don't need to disclose everywhere—only where trust, impact, or accountability matter.

Practical Reminder

- AI output reviewed by a human
- No sensitive data shared with AI
- Use of AI is appropriate and proportionate

- Language is fair and respectful
- A responsible person is clearly identified

Mandatory Security Settings (ChatGPT)

Turn OFF model training

- Settings → Data Controls → Improve the model for everyone → OFF
- **Effect:** Your chats are not used for training.

Clear stored data regularly

- Settings → Data Controls → Delete
- Delete chat history
- Delete all chats
- Delete data from all devices
- Delete remote browser data (highest risk area)

Mandatory Security Settings (Copilot)

✓ Works automatically with Microsoft 365 protections:

- Purview DLP
- Sensitivity labels
- Conditional Access
- Audit logs
- Microsoft Entra MFA + SSO
- Multi-Geo / ADR for Canadian data residency

Ensure these are turned ON at admin level:

- DLP rules for “restrict pasting to external apps”
- Sensitivity labels (Confidential / Internal)
- Proactive risk detection (Purview)
- Audit log search retention ≥ 90 days



Free vs Paid AI — The Fast Truth

Feature	Free GPT/Public AI Tools	Paid GPT (Team/Enterprise)	Free Microsoft Copilot	Paid Microsoft Copilot
Data Residency [1]	✗ Stored in U.S./global; cannot choose country	✓ Region/country choice; workspace must be provisioned with residency	⚠ Data may be stored outside Canada	✓ Data stays within Microsoft Canada datacenters
Interference Residency [2]	✗ U.S. only; no guarantees for free products	✗ Only supported in U.S.	⚠ AI Processing likely in U.S.	✓ Stays in Canada if ADR/Multi-Geo configured
Data Use & Retention	✗ User data may train models; no zero-retention options	⚠ No training; logs 30 days; MAM[3]/ZDR[4] available ✓ API data not used for training unless you opt in; 30-day log retention; <u>MAM & ZDR supported</u>	⚠ Not enterprise-safe; no training but grounded in public web	✓ Tenant-grounded; never trains models Stays in your M365 boundary
Access to your data?	✗ No access unless manually uploaded	⚠ Not connected by default; optional integration	✗ No access to M365; web-grounded only	✓ Has access to your company data (with security controls)
FOIPPA/PIPA Compliance	✗ Not compliant; no personal info allowed	✓ Conditionally compliant with Canadian residency + contracts	✗ Not FOIPPA compliant	✓ Designed for FOIPPA/PIPA/GDPR/SOC2
Training on data	✗ Yes - unless you opt out; policy may change	✓ Enterprise: No training use; U.S.-hosted; API: no training unless opted in	✓ Does NOT Train on your data	✓ Never used for training; fully isolated
Access Controls (SSO/MFA)	✓ Basic only	✓ Enterprise SSO, MFA	✗ Runs as a consumer Microsoft service, not tied to your tenant identity.	✓ Uses Azure AD / Entra ID
Auditing & logging	✗ No enterprise audit logs	✓ Admin audit logs; corporate compliance	✗ No enterprise audit logs	✓ Full logging in Microsoft Purview/Audit
DLP / Endpoint Security Integration	✗ No DLP	⚠ Via MS Purview or 3rd party	✗ No DLP; personal non-tenant service	✓ Integrated with Microsoft 365 Security stack
Risk level	High	Medium-High	Medium-High	Low

[1] Controls where your data is stored at rest (prompts, chats, files stay inside a specific country/region).

[2] Controls where the AI model processes your data (GPU execution happens inside a specific region).

[3] Modified Abuse Monitoring

[4] Zero Data Retention

The Five Golden Rules of Safe AI Use

Don't paste personal or client data into free AI tools.

Always include human validation.

Use only Copilot or ChatGPT Enterprise for professional tasks.

Disable model training and clear browser data remotely.

Always verify results using reliable sources.



AI Security Risks You Must Understand

Hallucinations: AI invents information confidently.

➔ Always ask: “Show the sources you used.”

Confidentiality leaks: Pasting sensitive content into free tools exposes it to global servers.

➔ Use placeholders (Client X, Employee A).

Prompt Injection: Malicious prompts override safety and extract data. Highest risk: free tools, shady websites, Chrome extensions.

➔ Never run “AI tools” from unknown sites.

Shadow AI: Employees quietly use free AI without controls.

➔ Train staff. Deploy DLP. Allow secure Copilot.

Safe Prompting Framework (3 Steps)

1

Data Quality Check (No Assumptions)

“List missing, unclear, or contradictory data based only on this dataset.”

2

Dataset-Only Analysis

“Analyze only what is explicitly present. No guessing.”

3

Validation

“List the exact rows and fields used to support each conclusion.”

This prevents hallucination and fabrication.

Prompt samples: Do Research

You are a nonprofit research analyst.

Task:

Review the past 12 months of publicly available information for XXX competitor only.

Sources to use:

- Official website: <https://xxx.ca/> (News, Blog, Announcements, Programs, Press)
- Publicly accessible LinkedIn content from: LinkedIn Link
- Use ONLY information that is publicly accessible and citeable.
- Clearly cite sources with direct links.
- Do NOT invent statistics, impact numbers, or campaign results.
- If LinkedIn content is not accessible or limited, state this clearly.
- If information is missing or unclear, say so explicitly.

Output format (use this exact structure):

1) Key Campaigns & Initiatives (Past 12 Months)

- List major campaigns, programs, or initiatives (1–5 bullets)
- Brief description of each
- Primary purpose (service delivery, fundraising, awareness, community engagement)

2) Core Activity Areas

- Main focus areas (e.g., housing & shelter, employment services, seniors, families, food security)
- Notable shifts or expansions over the year

3) Communications & Engagement Patterns

- Types of activities shared publicly (program updates, community partnerships, events, calls for support)
- Role of the website vs. LinkedIn in communications

4) What This Signals Strategically

- What XXX appears to prioritize based on the past year
- Opportunities or gaps visible from public activity
- Potential themes for future campaigns

5) Sources

- List all source links used, grouped by:
 - Website
 - LinkedIn

Prompt samples: End-of-Year Campaign

Goal:

Create a sample end-of-year fundraising campaign for a real nonprofit that my team can review, refine, and approve.

Organization:

link website XXX

Name of competitor XXX

Context (use only public information and what I provide below):

- Organization type: Community services nonprofit
- Mission reference: Support for individuals, families, and communities through inclusive social programs
- Primary audience: Individual donors and long-time community supporters
- Campaign goal: Year-end donations to support community-based programs
- Campaign timeline: November 15 to December 31
- Key program focus (high level, non-sensitive):
 - Mental health and family support services
 - Community and social inclusion programs
- Tone: Warm, human, community-focused, trustworthy – not salesy or exaggerated

Brand & Design Guidance:

- Follow Beacon Community Services' brand tone and language based on their website
- Use brand-aligned colors and visual style inspired by the website
- Assume the Beacon Community Services logo will be used (do not recreate the logo)
- Design content that would visually fit Beacon's existing website and LinkedIn presence

Constraints:

- Use only public-facing information
- Do not invent statistics or impact numbers
- Avoid sensitive or personal data
- All content must be suitable for human review and approval

Deliverables (in this order):

- 1) A simple campaign strategy (campaign theme, key message, and call-to-action)
- 2) A 6-week end-of-year campaign calendar (weekly focus and channels)
- 3) A 5-email donor sequence (subject lines and short draft copy)
- 4) Content for a donation landing page:
 - Headline
 - Short intro paragraph
 - 3 key impact sections
 - Call-to-action copy
- 5) 5 LinkedIn post drafts promoting the campaign (brand-aligned, professional, community-focused)
- 6) A short checklist for human review (brand alignment, accuracy, privacy, ethics)

Ask me up to 3 clarifying questions ONLY if absolutely necessary. Otherwise, make reasonable assumptions and proceed.

Prompt samples: LinkedIn Post

Design a clean, professional LinkedIn post (1080×1080) for a nonprofit year-end campaign.

Organization: XXXX

Layout:

White background

Top left: YMCA-YWCA logo

Center: bold headline text

Bottom section: red call-to-action bar

Text:

Headline: Support a Stronger Community

Subtext: Your year-end gift helps keep inclusive programs open to everyone.

CTA button: Donate Today

Style:

Minimal, modern nonprofit design

Use YMCA red (#C41230) for buttons and accents

Sans-serif font

Lots of white space

No busy backgrounds or stock-photo collage

Prompt samples: Grant application drafting

Act as a nonprofit grant writing assistant.

Organization: Beacon Community Services

Task:

Draft a first-pass grant application narrative for internal review.

This is a draft only and must be reviewed by staff.

Grant context:

- Grant type: Community-based services / social support
- Funder audience: Government or foundation reviewers
- Purpose: Support delivery of community programs

Instructions:

- Use clear, professional language suitable for funders
- Do NOT invent statistics, numbers, or impact claims
- If information is missing, clearly flag it
- Keep the draft realistic and conservative

Structure the output exactly as follows:

1. Organization Overview

Brief overview of Beacon Community Services, its mission, and the communities it serves.

2. Community Need

High-level description of the community need this grant would address.

Avoid specific data unless provided.

3. Program Description

Describe the proposed program or service:

- Who it serves
- What activities will be delivered
- How it aligns with Beacon's mission

4. Expected Outcomes

Describe intended outcomes in qualitative terms ONLY

Prompt samples: Grant application drafting Copilot Agent

Create a nonprofit grant application drafting agent.

The agent should help nonprofit teams create first-pass grant application narratives for internal review. It should draft clear, professional, and conservative grant content suitable for government or foundation funders.

The agent must:

- Use only approved or provided information
- Never invent statistics, outcomes, financial figures, or impact claims
- Clearly flag missing or unclear information
- Produce structured drafts, not final submissions
- Require human review and approval

The agent should follow a consistent grant structure, including:

- Organization overview
- Community need
- Program description
- Expected outcomes (qualitative only)
- Organizational capacity
- Evaluation approach
- Sustainability
- Missing information checklist

Tone should be professional, neutral, and credible — not promotional or fundraising-focused.

The agent should be designed for nonprofit use and safe, responsible AI adoption.

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