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AI foundations and policy for CSOs

CSOs and AI webinar series, webinar 1

Miloš Janković, Shift Happens

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EASTERN PARTNERSHIP CIVIL SOCIETY FACILITY PROJECT

#EaPCivilSociety

Agenda

1. How generative AI works, where it stands today, and where it fails
2. AI in your organization: levels of use, and why AI implementation fails in CSOs
3. AI policy: data privacy, accountability, transparency, environment
4. Choosing the right tool and model
5. Questions and closing

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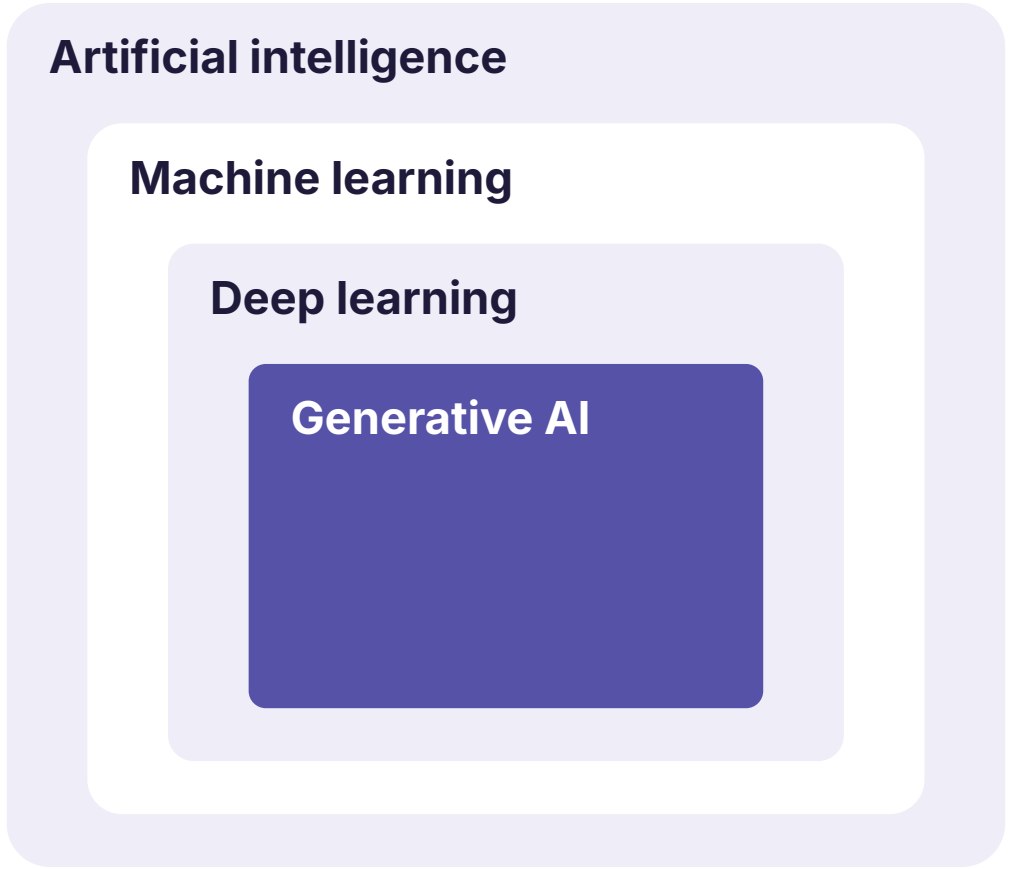
How generative AI works

Where it stands today, and where it fails

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AI has been around for decades. Generative AI is its newest branch



Artificial intelligence

Systems that do tasks we link to human intelligence, such as search and translation.

Machine learning

Systems that learn patterns from data instead of following written rules.

Deep learning

Advanced machine learning with many-layered neural networks.

Generative AI

Models that create new content: language models write text, diffusion models make images.

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HOW GENERATIVE AI WORKS

AI doesn’t understand. It produces words without thought



You have used AI for years

Google search, Netflix recommendations, autocomplete. AI has worked in the background for decades.



Now it also creates content

It used to sort, rank and suggest. Now it writes text, makes images and code, and answers your questions in plain language.



It guesses the most likely next word

Each word in an answer is chosen by probability. Think of a very advanced autocomplete, with no understanding behind it.

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A model reads text as tokens: symbols and groups of letters

Tokenization splits unrecognizable words into parts, but not into individual letters.

Split by GPT-4o's tokenizer: each colored block is one token

Counted in tokens

Usage limits and prices are measured in tokens, for what you send and what you get back.

Your language matters

Languages with less training data often take more tokens for the same text.

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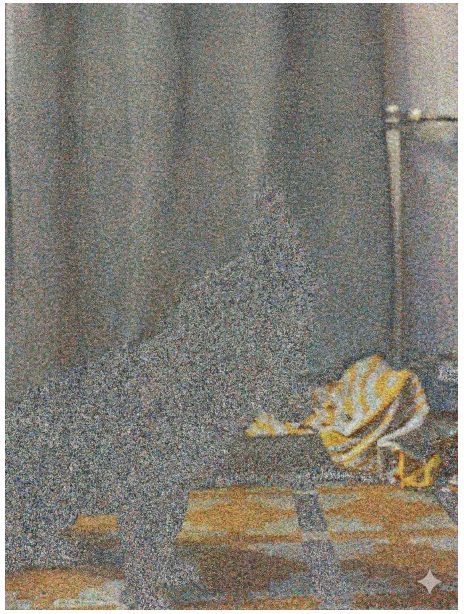
HOW GENERATIVE AI WORKS

Diffusion models turn random noise into an image, step by step

Trained on huge collections of images and their descriptions. The model starts from pure noise and removes a little of it at each step, guided by your prompt, until a picture appears.



1 Random noise



2 Shapes emerge



3 Details form



4 Final image

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WHERE AI STANDS TODAY

From chat to agents in 4 years, but with a price

Your AI has been heavily subsidized. The labs still lose money, even on paying users. Prices and limits now move toward what AI really costs.

NOV 2022

ChatGPT launches

100 million users in 2 months. Chatting with AI goes mainstream.

2023

The race starts

GPT-4, Claude and Gemini arrive, and models start reading images.

2024

Prices fall

Labs compete for users, and the price per token keeps dropping.

2025

Reasoning models

Models think before they answer. Results get much better, and each answer uses far more tokens.

EARLY 2026

Agents

Claude Cowork and OpenClaw: AI that works in your files and apps, for minutes or hours.

SUMMER 2026

The bill arrives

The newest models move to paid usage credits, and 5-hour and weekly limits tighten.

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WHERE AI STANDS TODAY

The newest models are powerful, but we can’t use them like it’s 2024

Until recently, good results meant long prompts packed with every detail and instruction. Today’s models plan their own steps, so that approach no longer works and can even make answers worse.

It plans the steps

Give it the goal and the finish line. Steps you write can block a better plan.

It checks its own work

It tests, rereads, and fixes before it reports back. You still check facts and sources.

It works longer alone

One request can run for hours, across files and tools.

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WHERE AI FAILS

But AI sounds just as sure even when it is wrong

Your job: check every fact, number, name, and source before anything goes to a donor, partner or beneficiary.



Hallucinations

Invented facts and sources read as fluently as true ones, though newer models tend to hallucinate much less.



Bias from training data

It repeats patterns from its training data: often US-centric, English-first, and stereotyped images of the communities you serve.



Reasoning gaps

Reasoning models plan and check their work, but can still call a job done even when it isn't.

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WHERE AI FAILS

Why most AI answers end up as unusable slop



Intention gap

AI reads the instruction, not the intention. What you typed and what you meant are two different things.



Precision tax

The vaguer the task, the more AI improvises. Improvisation means generic output.



Illusion of memory

AI doesn't remember a conversation the way you think. In a long thread, it starts to forget and make things up.



Expertise paradox

To judge whether the output is good, you must already know what good output looks like.

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AI in your organization

Levels of use, and why AI implementation fails in CSOs

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Two pressures pull CSOs in opposite directions on AI



Lack of resources highlights the need for more efficiency, and AI can help.



Data ownership and environmental concerns are real and should be addressed.

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AI IN YOUR ORGANIZATION

Three levels of AI use: chat, automation, and agents

Chat

PROMPT → ANSWER

You ask, AI answers, and you take it from there. Most CSOs work this way.

Example

Draft a newsletter introduction, or draft a section of a new grant proposal

Automation

IF THIS → THEN THAT

A fixed sequence that starts on a trigger and runs the same way every time.

Example

A new online donation triggers a drafted thank-you email, and adds contact to CRM

Agent

GOAL → OUTCOME

You set a goal. AI plans the steps, uses your tools and checks with you before it acts.

Example

Research 20 local companies, draft a shortlist for partnership pitches, and reach out to them

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Most CSOs have no fixed workflows for AI to take over



The trap

Staff wear too many hats, and every donor and project brings its own templates, reports and approval steps. There is no stable process for AI to take over.



The solution

Write down one task that repeats across projects, such as donor reports or event follow-ups. Map its steps, then decide where AI fits.

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AI implementation in CSOs fails when it starts too big



The trap

CSOs try to automate large, complex core workflows straight away. The scope grows until the project stalls.



The solution

Focus on simple wins where errors are cheap and the output lands in systems you already use, without friction.

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A ban sends AI use underground

“Secret cyborgs”

Staff who use AI quietly, because they fear getting in trouble. The trouble usually starts with organizational policy.

Ethan Mollick, Wharton School

Write targeted rules

Rules for specific types of use, such as personal data in personal AI accounts.

Make telling safe

Promise that sharing an AI use won’t cost anyone their job.

Reward sharing

Give time in team meetings to uses that worked, and credit the people behind them.

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Two ways to bring AI into a CSO: crowd and lab

It’s not only about the technology. It’s about your organizational culture.

CROWD

Encourage the whole team to test and play

Bottom-up experimenting: fast learning, quick adjustment and shared knowledge.

LAB

Set up a small team that explores use cases

Top-down implementation: slower progress, but more predictable and stable.

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AI maturity: 5 levels, from awareness to transformation

1

Awareness

You know what AI could do for your mission, but nobody uses it yet.

2

Active

People experiment on their own. Use is ad hoc: a chat here, a summary there.

3

Operational

AI is part of everyday processes, and a small team improves its use.

4

Systemic

AI improves how you deliver your mission and helps you anticipate needs.

5

Transformational

AI is core to your mission, from research to outreach and services.

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AI policy

What your team agrees to, written on 2 or 3 pages

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AI POLICY: THE PROCESS

Build your policy in 3 steps

Your AI policy should not only ban certain types of usage but also empower and educate your staff.

1

Discuss and agree

Map how your team uses AI today and agree on 4 to 6 guiding principles.

2

Draft

Write 2 or 3 pages in plain language, with examples from what your team has shared.

3

Finalize and share

Collect feedback, approve the policy, and walk everyone through it.

It's a living document. Review it every 6 to 12 months.

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AI POLICY: THE STRUCTURE

6 sections every CSO's AI policy needs

Purpose
Why you use AI and how it serves your mission

Scope
Who the policy applies to and which tools it covers

Principles
Privacy, accountability, transparency, and, if you choose, environment

Approved tools
Which tools staff may use, and on which accounts

Allowed and prohibited uses
What's encouraged, checked first, or off-limits

Ownership and review
Who owns the policy, answers questions, and reviews it

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Purpose and scope: why you use AI and who the rules cover



Purpose

Link AI to your mission. Ask: Which of our goals can AI help us reach? How does it fit our values? What will success look like?



People

Staff, volunteers, board members, contractors, and partners who work with you



Tools

Every AI tool you build, buy, or use inside other platforms, including cloud services

EXAMPLE: CATALYST BALKANS

"We use AI to find data about giving across the Western Balkans and classify it into our database automatically. A richer database gives the fundraisers we serve better data on who gives, how much, and to which causes."

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AI POLICY: PRINCIPLES

Data privacy: the data decides which tool you can use

Treat anything you type into a personal AI account as if you were giving it to a company.

	EXAMPLES	RULE
Public	Published reports, website content	Any approved tool
Internal	Internal memos, project plans	Approved tools on organization accounts
Confidential	Financial records, internal strategy documents, confidential partner information	Ask the policy owner first
Highly sensitive	Personal data of donors, volunteers, or beneficiaries; case files, medical information, asylum testimonies	Never in personal AI accounts. Anonymize it first

Anonymize before you paste: write “Client A” instead of a real name. This applies to uploaded files too.

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AI POLICY: PRINCIPLES

Accountability: AI drafts, people decide

Keep a person in the loop at every step.



Review

Check facts, numbers and sources. AI can report a task as done when it isn't.



Iterate

Give specific feedback, or ask another model to challenge the draft.



Decide

Strategy, priorities and promises to beneficiaries and supporters stay with you.



Send

A person signs, sends and submits.

People make decisions about people. AI never decides who receives a service or a grant.

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Transparency: tell people when AI shaped what they see

Label AI-generated images and video

Anyone who sees them should know they aren't photos.

Tell funders and partners

Say when a text is largely AI-generated, and check each funder's rules on AI in proposals and reports.

Never fake the people you serve

No AI-generated beneficiaries or stories presented as real.

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Environment: use the smallest model that does the job

Even if your policy leaves the environment out, these habits save tokens and cut energy use.

Match the model to the task

Frontier models for strategy and brainstorming, faster models for drafting and summaries.

Upload plain text

Markdown or text files carry the same content as a PDF in fewer tokens.

Ask if the task needs AI at all

A template or a search is often enough.

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Allowed and prohibited uses

What's allowed depends on the tool, the task and the data together. When in doubt, pause and ask.

Must not do Off-limits, whatever the tool	Personal data in personal AI accounts; AI deciding who gets a service, a grant or a job; using AI to get around security or reach data you aren't authorized to see
Pause and ask Possible after a check with the policy owner	A tool that isn't approved yet; confidential information; a public chatbot that speaks on your behalf; AI connected to your email, files or database, where it can read everything
Approved uses Go ahead with approved tools, and review the result	Routine emails and posts; summaries of public reports; campaign brainstorming

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Choosing the right tool and model

Data control, task and cost

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Choose a tool by data control, task and cost

Option	Data control	Good for	Cost
Free plans	Lowest. Limits and training settings change often	Trying things out with public information	Free
Paid personal plans	Better settings, but one person's account	Regular individual work	Monthly, per person
Team and business plans	Shared admin; business data is usually excluded from training	Teams that share projects, files and skills	Monthly, per person, often discounted for CSOs
Open models	Highest when they run on your own hardware	Sensitive data, local languages, transcription	Free models; you pay for hardware or hosting

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CHOOSING TOOLS

Open models are AI you can download and run under your own control

Their makers publish the model itself, not only an app. You can run it on your own computer, on a server you rent, or through a provider you choose.

Hosted provider

Pay per use, no setup. Your data goes to the provider, so pick one that hosts in the EU.

Rented server

Your own copy of a model on a rented server, billed while it runs.

Your own hardware

The model runs on your computer or server. Data stays with you.

More control, more privacy, more technical work

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CHOOSING TOOLS

Main open models

Run on your own machine, none of these models sends your data anywhere. The maker still shapes language quality and bias.

CHINA · DEEPSEEK

DeepSeek V4

V4 Flash runs on your own server with 256 GB of memory.

CHINA · MOONSHOT AI

Kimi K3

The largest open model so far; it needs a server with many high-end GPUs.

CHINA · ALIBABA

Qwen 3.8

27B fits a 32 GB Mac. Avoids topics that are sensitive in China.

EUROPEAN · FRANCE

Mistral

Ministral 3 runs on a laptop; Small 4 and Large 4 need a server or a data center.

EUROPEAN · EU CONSORTIUM

EuroLLM

Built for all 24 EU languages plus Ukrainian, Russian and Turkish.

EUROPEAN · SWITZERLAND

Apertus 1.5

Fully open, down to its training data. Trained on 1,000+ languages.

USA · META

Muse Glimmer

Meta’s open model for local use (2026). Runs on a single 24 GB graphics card.

USA · GOOGLE

Gemma 4

A good all-rounder across many languages, in several sizes.

USA · OPENAI

gpt-oss

The 20B runs on a 16 GB laptop; the 120B needs 128 GB.

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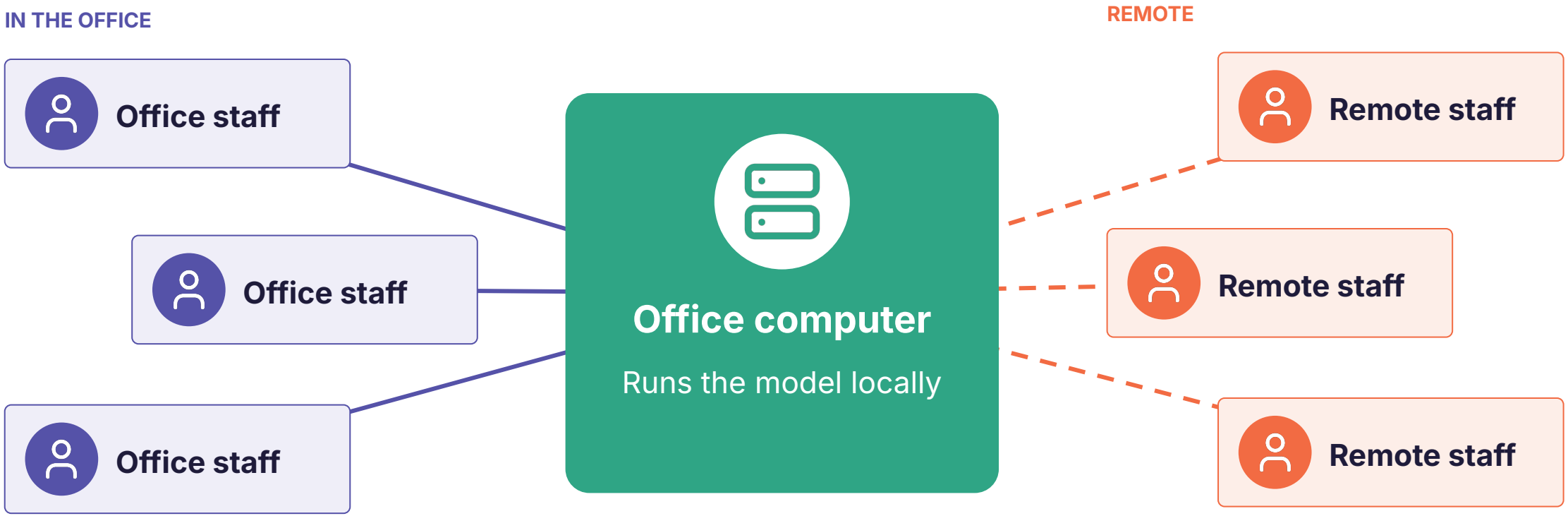
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One office computer can run AI for the whole team

With the right hardware and software, one computer can run a model locally. Staff use it in a chat window, like any other AI tool.



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CHOOSING TOOLS

If open models are too technical, get commercial AI tools at a discount

STEP 1: VERIFY

Goodstack

WHAT YOU GET

Verifies your nonprofit status. That verification opens the Google, OpenAI and Anthropic offers.

PRICE

Free. Most reviews take 3 to 5 business days.

goodstack.org

STEP 2: PICK AN OFFER

Google Workspace

WHAT YOU GET

Free edition: Gmail on your domain, Drive, Docs, Sheets, Slides, Meet, the Gemini app and NotebookLM.

PRICE

Free. Business Standard, with Gemini in Gmail and Docs: EUR 3.05 per user a month (annual).

Claude Team

WHAT YOU GET

Shared team workspace for 2 to 150 people. Your chats aren't used for training. One shared workspace.

PRICE

EUR 2.60 per user a month in low- and middle-income countries, EUR 7 elsewhere. 2 users min.

ChatGPT Business

WHAT YOU GET

Shared team workspace for 2 or more people. Your chats aren't used for training. One shared workspace.

PRICE

EUR 7 per user a month billed annually, EUR 8.70 billed monthly. 2 users minimum.

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Match the model and the effort to the task

Frontier models	**Fable, Opus, Astra, Argon**	Strategy, planning and hard analysis
Balanced models	**Sonnet, Terra, Pro**	Proposals, reports and content
Fast models	**Haiku, Luna, Flash**	Summaries, extraction and simple edits

Effort: use lower effort for the first draft, then higher effort to improve it.

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TAKEAWAYS

3 things to remember

1

AI predicts the next word

It doesn’t understand what it writes. That’s why it invents facts, repeats bias and needs a person to check its work.

2

Newer models can do real work

Despite those limits, they help CSOs prepare data, summarize, check quality, coordinate handoffs and brainstorm.

3

Help your team use AI well

Bans push AI use underground. Give people clear rules and good tools to use it strategically and ethically.

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RESOURCES

Free courses and authors to keep learning

Anthropic

AI BASICS

AI Fluency: Framework & Foundations

FOR NONPROFITS

AI Fluency for Nonprofits

OpenAI

AI BASICS

AI Foundations

FOR NONPROFITS

3 Steps to AI Literacy for Nonprofits

Google

AI BASICS

Introduction to Generative AI

FOR NONPROFITS

AI for Nonprofits

AUTHORS TO FOLLOW

Ethan Mollick
University of Pennsylvania
One Useful Thing newsletter

Nate B. Jones
AI expert and practitioner
Nate's Substack

Kevin Roose
The New York Times columnist
Hard Fork podcast

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