Working Smarter with AI: Practical Tools for Small Nonprofits

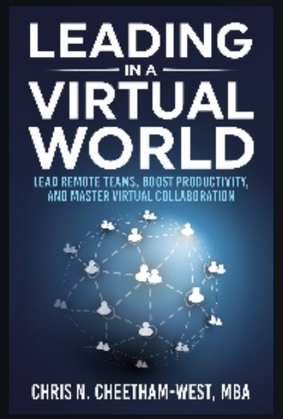
Chris Cheetham-West, mba

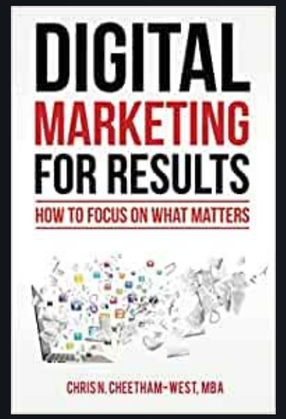
UNITED WAY
Orange County

Hello, I’m Chris!

About Me

- AI Expert & Keynote Speaker, Trainer
- Author, Leading in a Virtual World
- Founder & President, LR Training Solutions











WHAT IS

AI

& WHY IT MATTERS FOR YOUR NONPROFIT

WHAT IS AI

- AI is the ability of machines to learn, reason, and act in ways that mimic human intelligence.

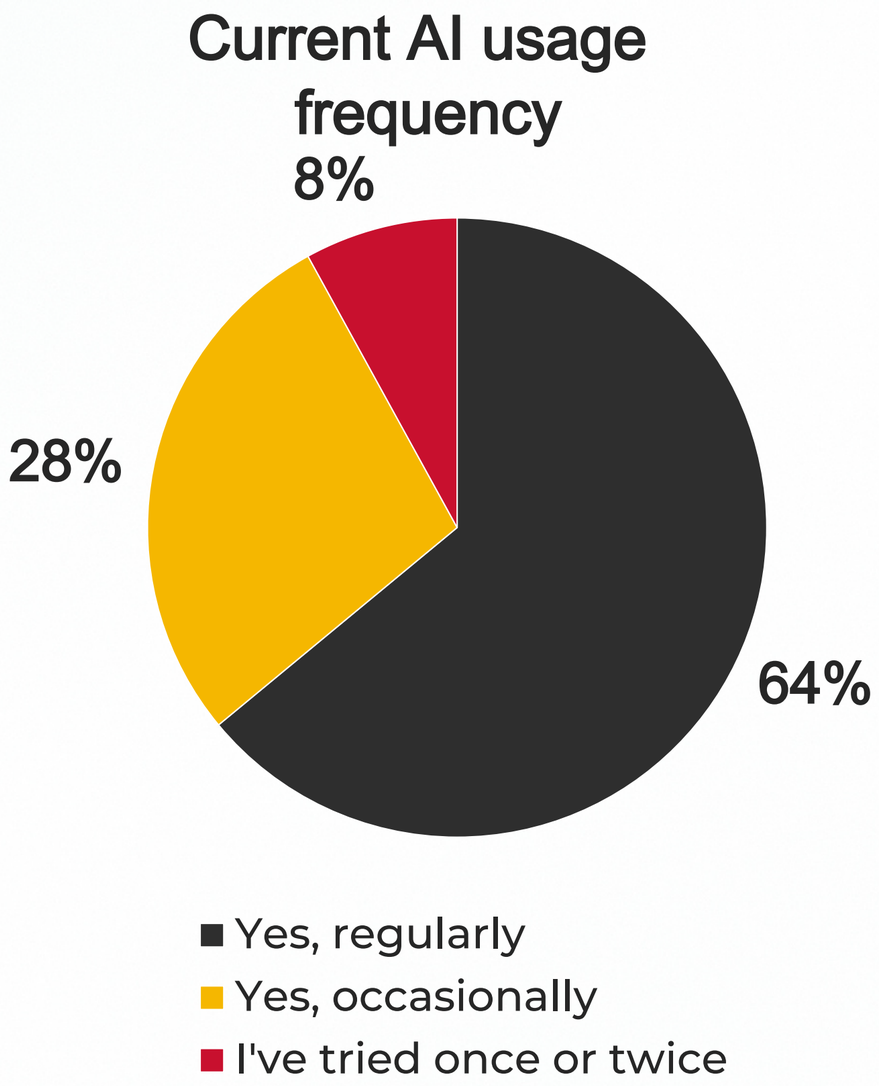
- AI can analyze data, identify patterns, and learn from experience to solve new problems without being explicitly programmed for them.

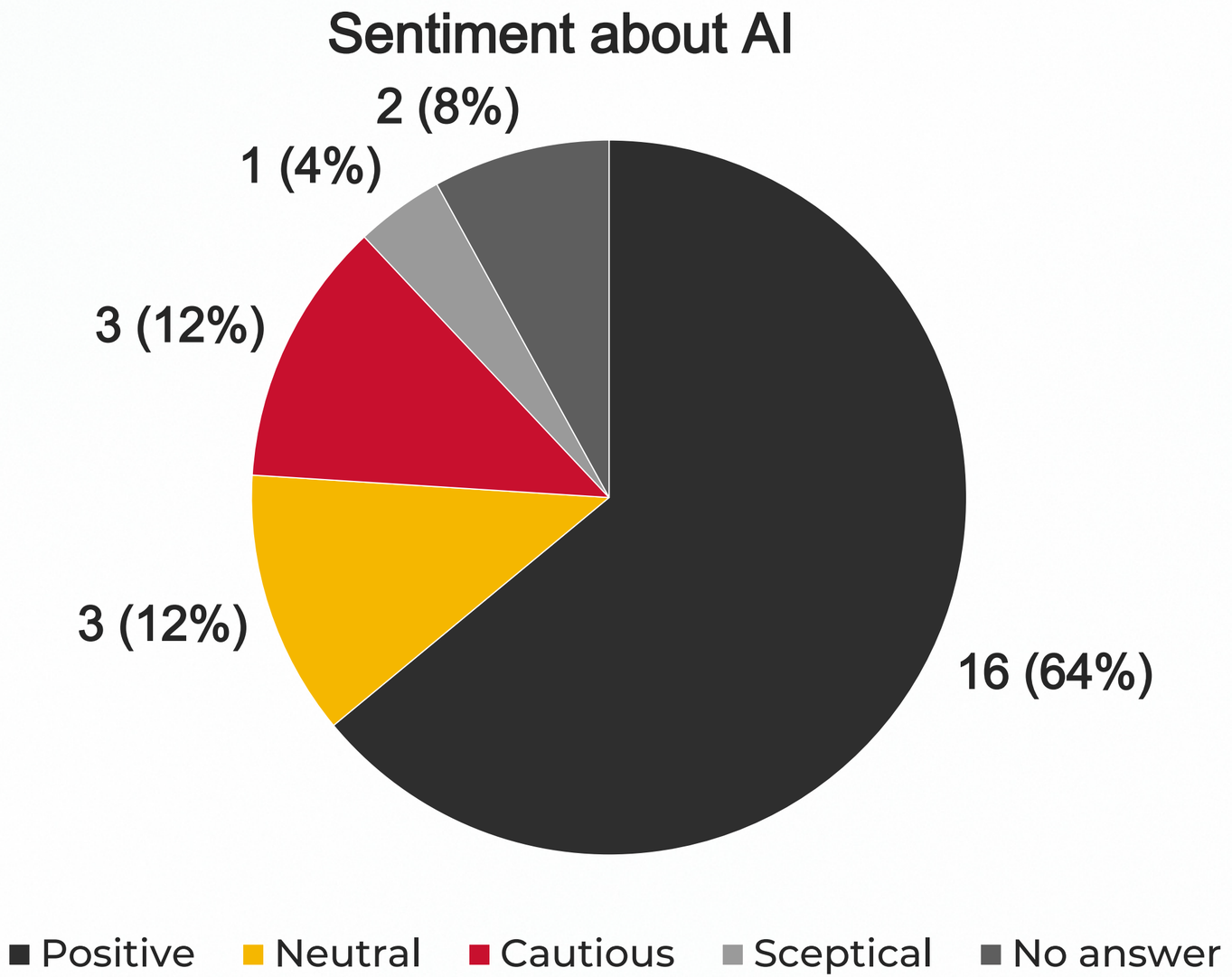


How often do you use AI?

How often does your audience use AI?

Be honest


Current AI usage frequency
8%
28%
64%
Yes, regularly
Yes, occasionally
I've tried once or twice


Sentiment about AI
2 (8%)
1 (4%)
3 (12%)
3 (12%)
16 (64%)
Positive
Neutral
Cautious
Sceptical
No answer

How would *you* describe your AI skill level?



Be honest

AI is ever ywhere

- From our phones to our playlists, it’s quietly shaping how we live, work, and connect.
- Everyday Examples
  - ChatGPT · YouTube · Siri · Google Translate
- On Our Phones
  - Autocorrect · Face ID
  - Voice Assistants like Siri
- Behind the Scenes
  - Natural Language Processing (NLP) powers virtual assistants (like Siri and Alexa), spam filters, and tools for sentiment analysis.



AI in action: Powering The modern World

- Predictive Analytics
- Real Time Information
- Speed Up Processes
- Pattern recognition



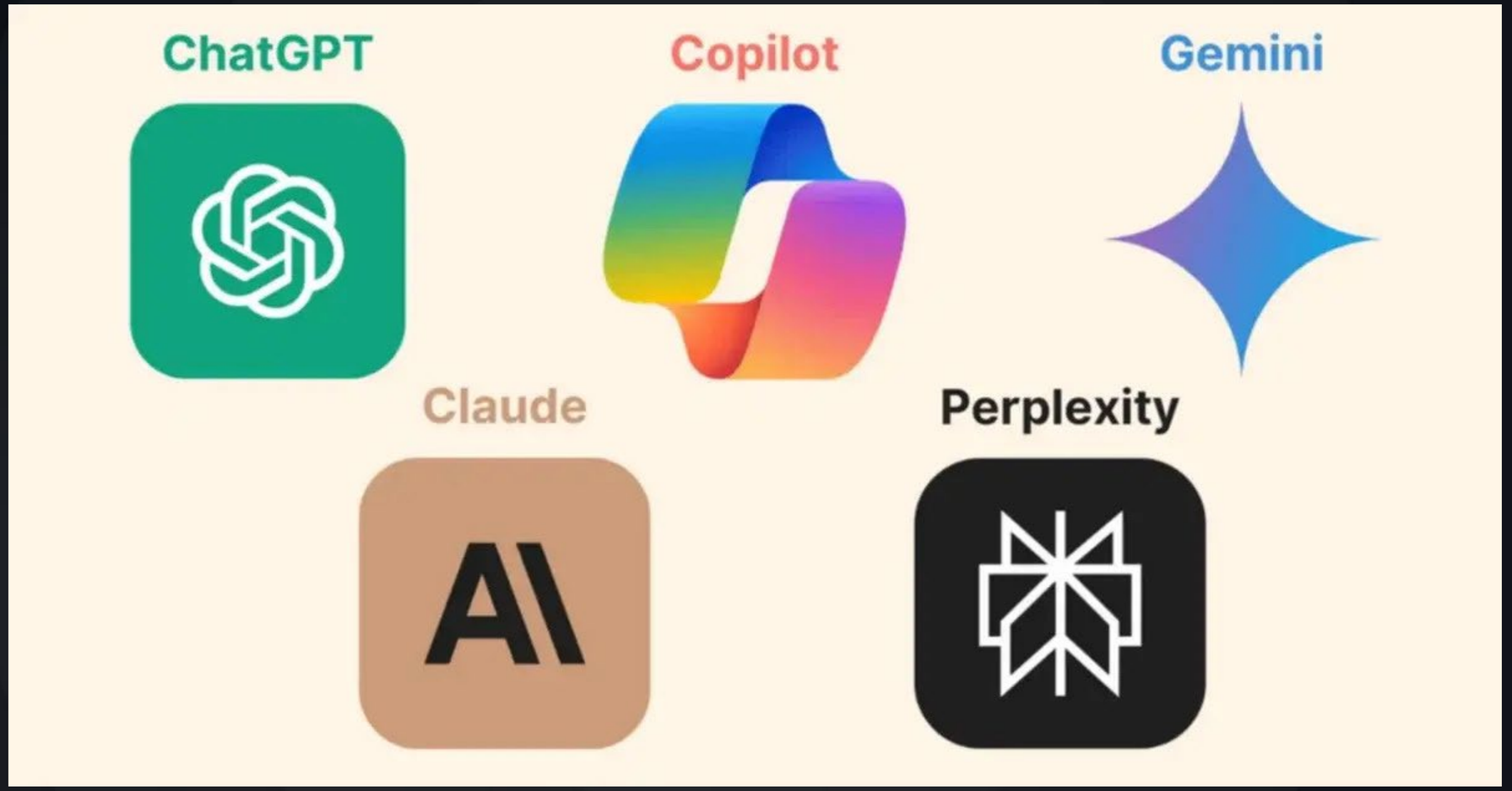
Beyond revenue

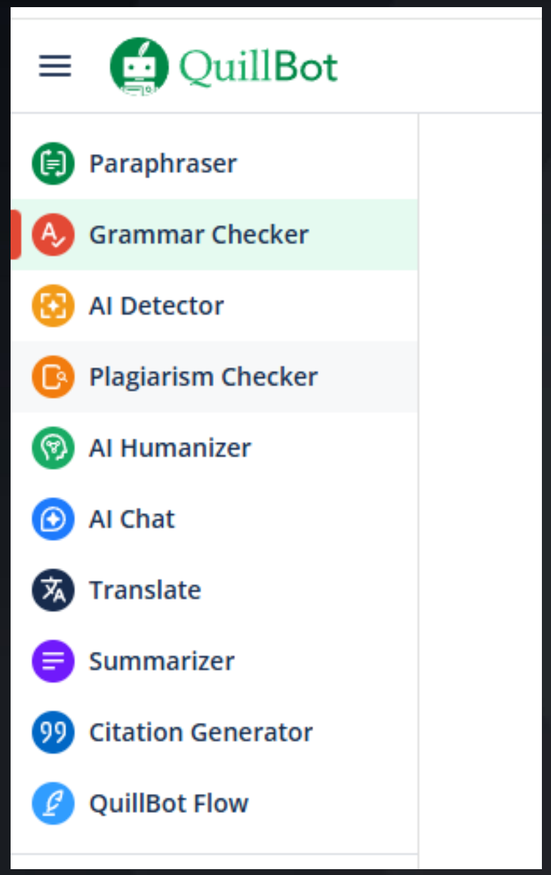
And efficiency

- AI isn’t just about doing more. It’s about working smarter and living better.
- How AI supports employees:
  - Reduces burnout by simplifying complex workflows
  - Creates space for creativity, learning, and innovation
- Result: Higher morale, stronger engagement, and better retention



Work With AI Effectively

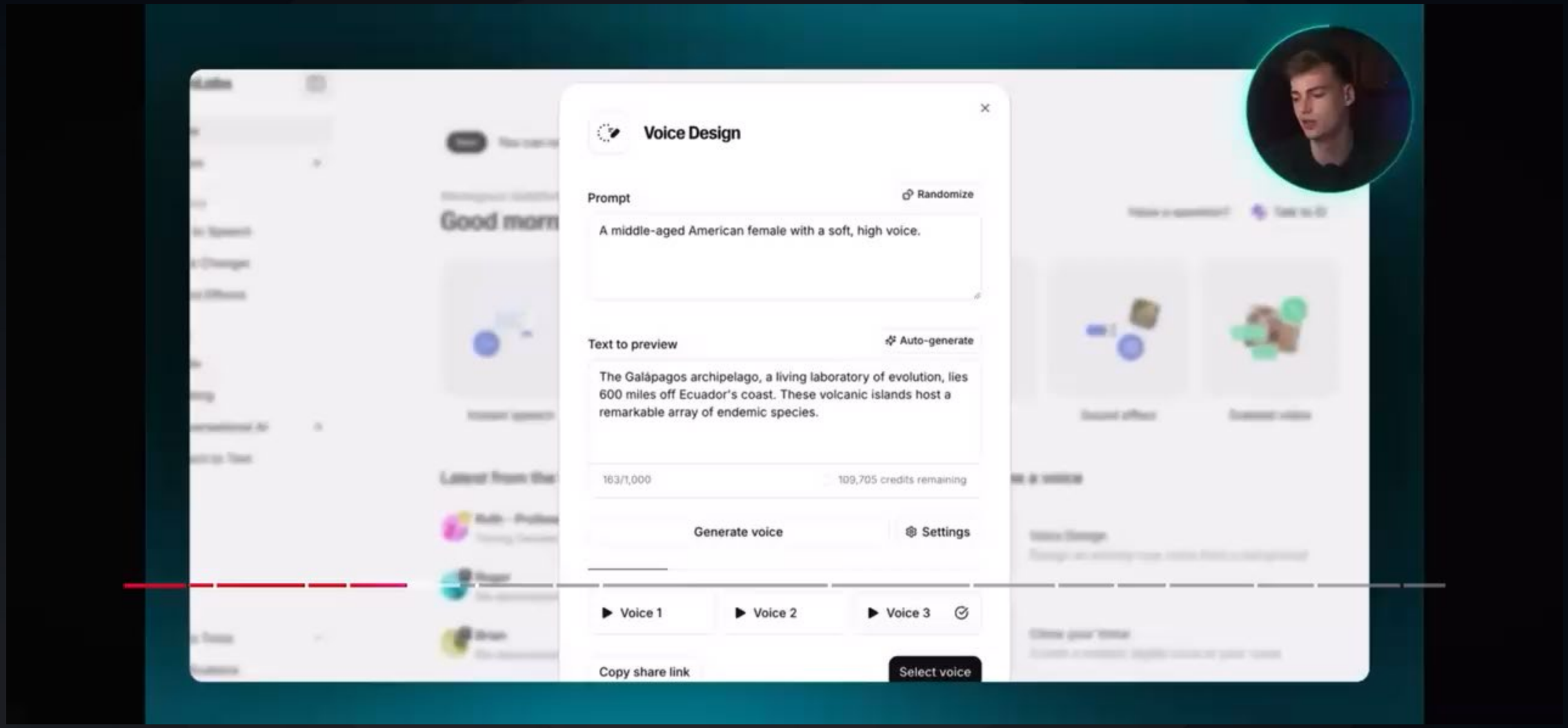

ChatGPT
Copilot
Gemini
Claude
Perplexity



Jasper

IIElevenLabs

Text to Speech & AI Voice Generator Tool



IIElevenLabs

Text to Speech & AI Voice Generator Tool

Google

Microsoft

Percentage | Calculation | Multiplication | Vlookup | Shortcut | Function


IQ HIKE

Top Excel Formulas

Follow @iqhike
Learn Smartly

S. N.	Formula Name	Formula Pattern
1	SUM	=SUM(A1:A10)
2	AVERAGE	=AVERAGE(B1:B10)
3	IF	=IF(C2>100,"Yes","No")
4	VLOOKUP	=VLOOKUP(D2, A2:B10, 2, FALSE)
5	HLOOKUP	=HLOOKUP("Sales", A1:D3, 2, FALSE)
6	INDEX	=INDEX(A2:C5, 2, 3)
7	MATCH	=MATCH(500, B2:B10, 0)
8	OFFSET	=OFFSET(A1, 2, 3)
9	TEXT	=TEXT(TODAY(),"DD-MM-YYYY")
10	CONCAT	=CONCAT(A1, B1, " - ", C1)
11	TEXTJOIN	=TEXTJOIN(", ", TRUE, A2:A5)
12	UNIQUE (Excel 365)	=UNIQUE(A2:A10)
13	FILTER (Excel 365)	=FILTER(A2:B10, B2:B10="Yes")
14	SORT (Excel 365)	=SORT(A2:B10, 2, TRUE)
15	SORTBY (Excel 365)	=SORTBY(A2:A10, B2:B10, -1)
16	SEQUENCE (Excel 365)	=SEQUENCE(5, 1, 1, 2)
17	RANDARRAY (Excel 365)	=RANDARRAY(3, 2, 1, 100, TRUE)
18	XLOOKUP (Excel 365)	=XLOOKUP("John", A2:A10, B2:B10, "NA")
19	XMATCH (Excel 365)	=XMATCH(100, A2:A10, 0)
20	LAMBDA (Excel 365)	=LAMBDA(x,x^10)(5)
21	LET (Excel 365)	=LET(x, A1*2, y, x+10, y)
22	ISNUMBER	=ISNUMBER(A2)
23	TODAY	=TODAY()
24	NETWORKDAYS	=NETWORKDAYS(A2, B2)
25	YEARFRAC	=YEARFRAC(A2, B2)
26	IFS (Excel 365)	=IFS(A1=1,"One", A1=2,"Two", TRUE,"Other")

IQ HIKE | Top Excel Formula Learn Smartly...


Basic Excel Formulas

S.No	Formula Name	Formula Pattern
1.	SUM	=SUM(A1:A5)
2.	SUM	=(A1+A2+A3+A4+A5)
3.	SUM	=(45+2+43+48)
4.	PRODUCT	=PRODUCT(F1:F2)
5.	PRODUCT	=(83*84*85)
6.	PRODUCT	=(34*65)
7.	SUBTRACT/MIN IS	=(E3-E4)
8.	DIVIDE	=(F3/F4)
9.	PERCENTAGE	=(G3/G4*100)
10.	MAXIMUM	=MAX(H3:M3)
11.	MINIMUM	=MIN(H3:M3)
12.	POWER	=POWER(2,4) [24=16]
13.	AVERAGE	=AVERAGE(C3:C14)
14.	SQUARE ROOT	=SQRT(25)
15.	COUNT	=COUNT(C4:P4)
16.	COUNT BLANK	=COUNTBLANK(C3:C16)
17.	COUNT IF	=COUNTIF(D4:Z4,"P")
18.	CURRENT DATE & TIME	=NOW()
19.	TODAYS DATE	=TODAY()
20.	DAY # OF CURRENT MONTH	=DAY(NOW())
21.	CURRENT MONTH	=MONTH(NOW())
22.	CURRENT YEAR	=YEAR(NOW()

Basic Excel Formulas → The Only Guide Yo...


21 Powerful Excel Formulas

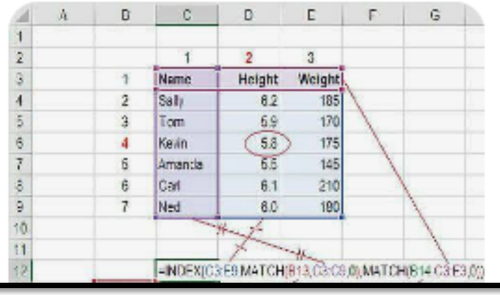
Make You Excel Expert!

01	=COUNTIF(	08	=NOW(	15	=REPT(
02	=SUMIF(	09	=COUNT(	16	=ROUND(
03	=PRODUCT(	10	=ROMAN(	17	=CONCATENATE(
04	=SUM(	11	=TRIM(	18	=LEN(
05	=MAX(	12	=UPPER(	19	=AVERAGE(
06	=MIN(	13	=LOWER(	20	=SUMPRODUCT(
07	=TODAY(	14	=PROPER(	21	=CODE(

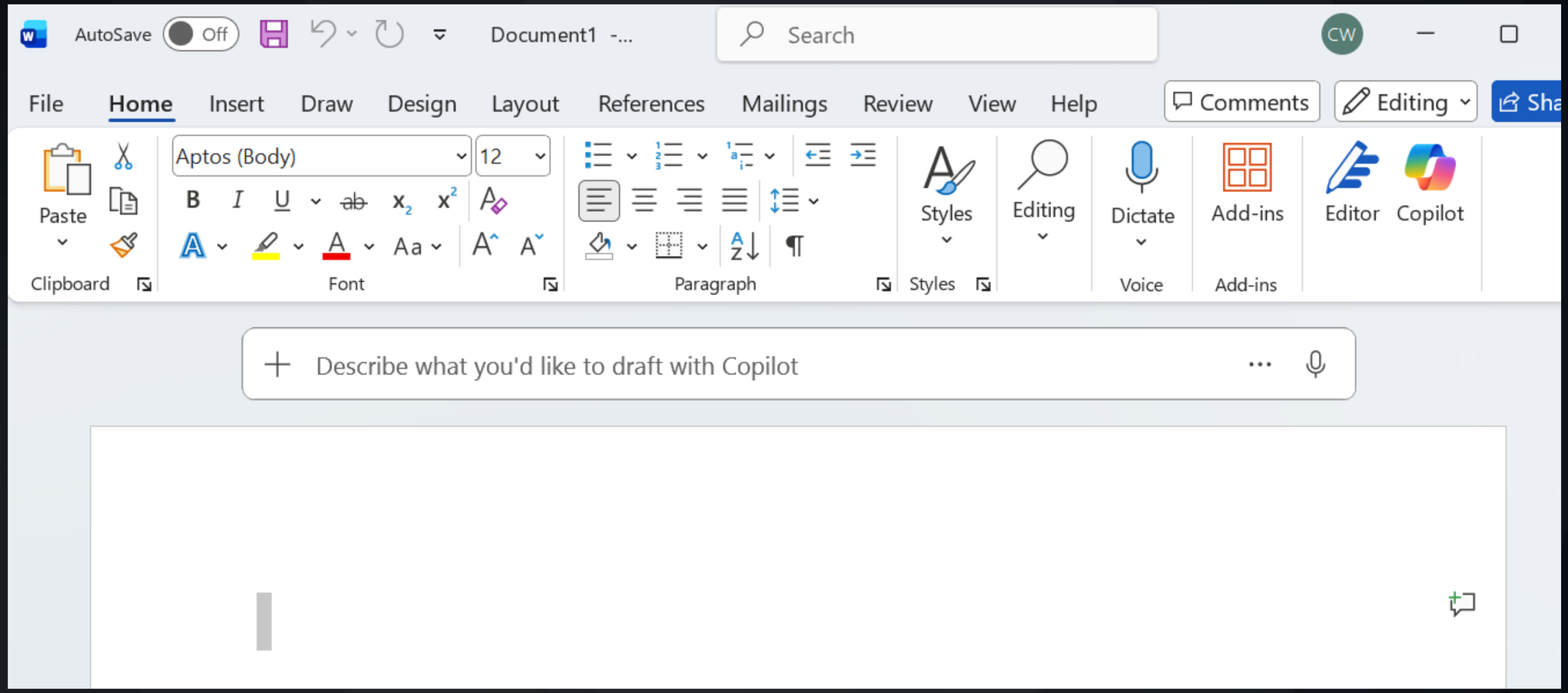
Most Useful For Beginners

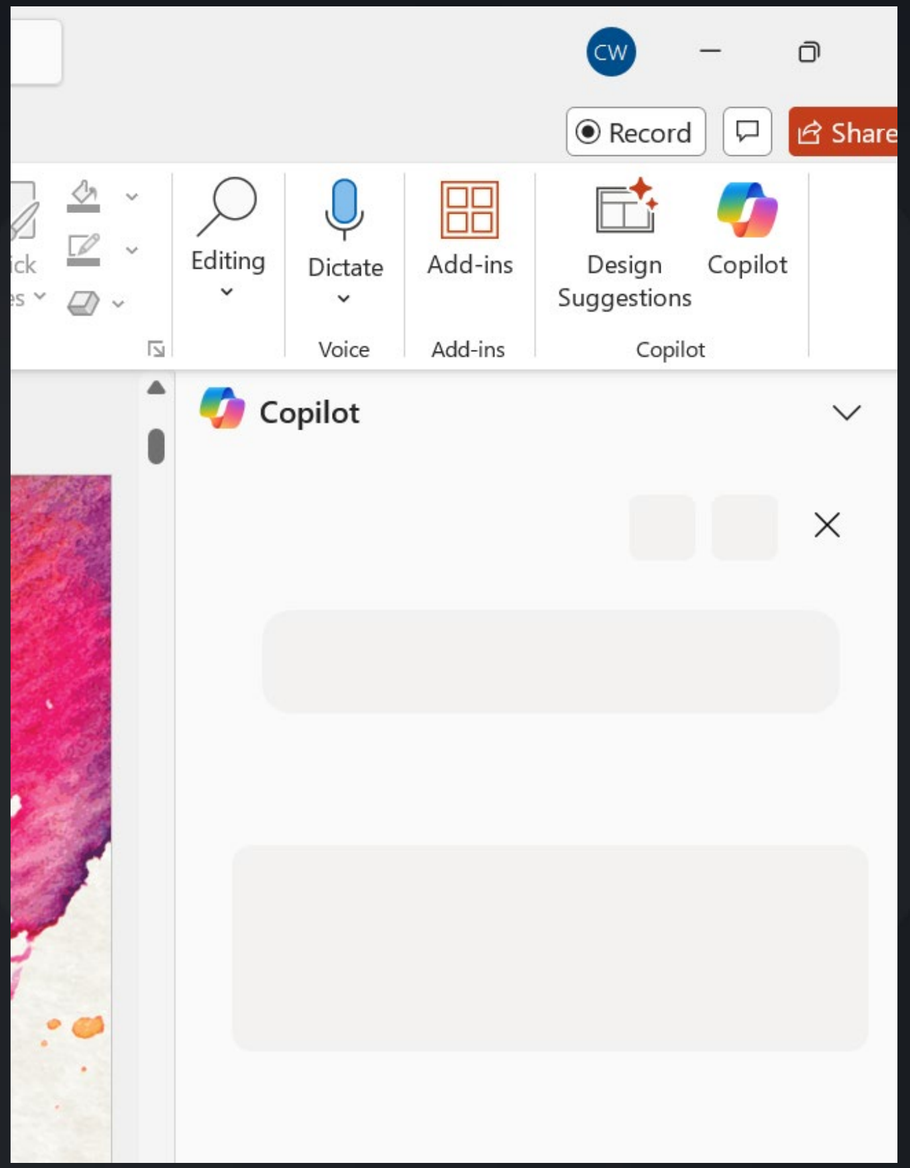
21 Powerful Formulas Will Definitely Make...

YouTube

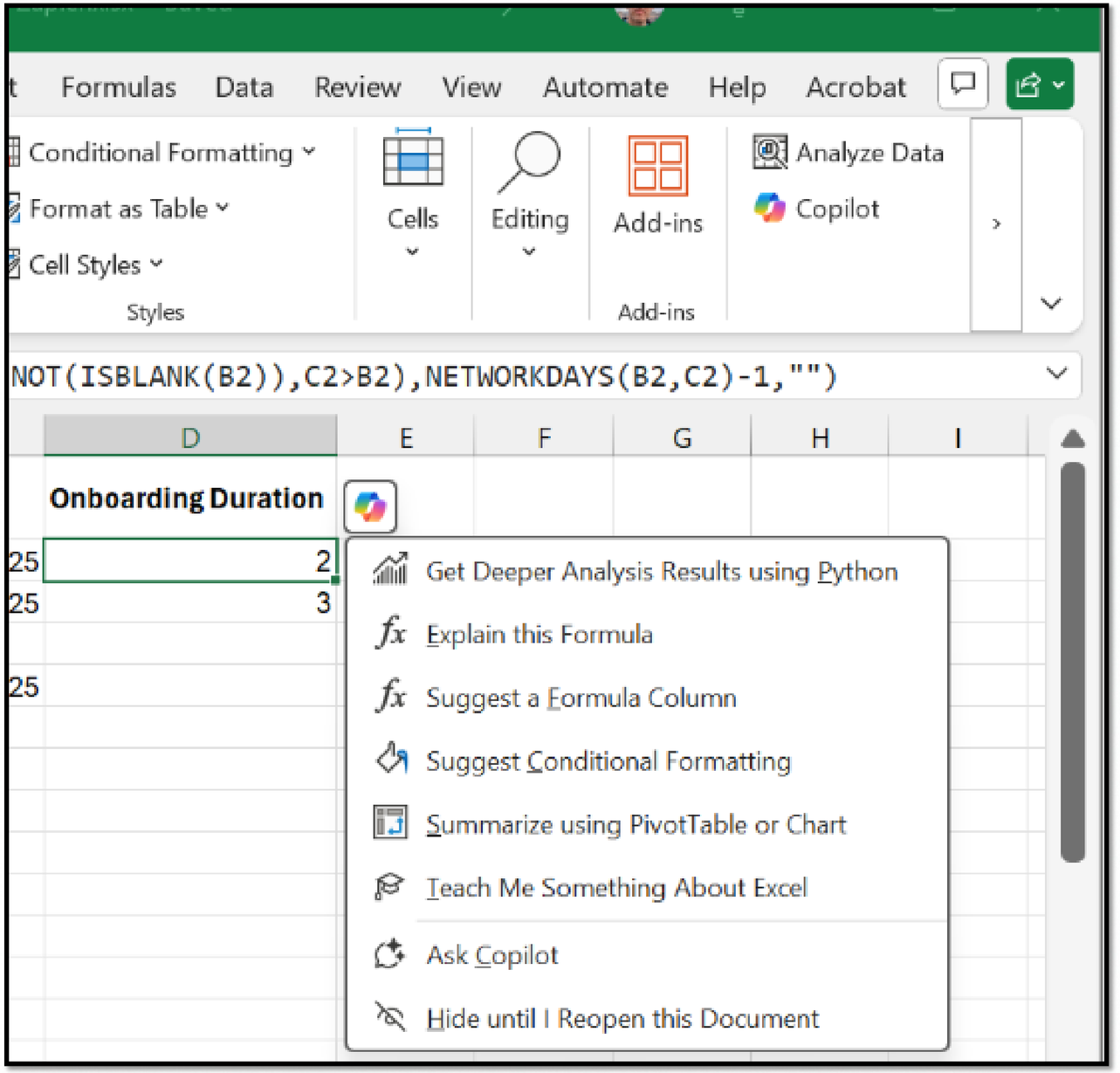

	A	B	C	D	E	F	G
1							
2			1	2	3		
3		1	Name	Height	Weight		
4		2	Sally	6.2	185		
5		3	Tom	5.9	170		
6		4	Kevin	5.8	175		
7		5	Amanda	5.5	145		
8		6	Carl	6.1	210		
9		7	Ned	6.0	190		
10							
11							
12			=INDEX(C3:E9,MATCH(B13,C3:C9,0),MATCH(B14,C3:E3,0))				


Medium


AutoSave
Off
Document1 -...
Search
CW
File
Home
Insert
Draw
Design
Layout
References
Mailings
Review
View
Help
Comments
Editing
Sha
Paste
Aptos (Body)
12
Styles
Editing
Dictate
Add-ins
Editor
Copilot
Clipboard
Font
Paragraph
Styles
Voice
Add-ins
Describe what you'd like to draft with Copilot


CW
Record
Share
Editing
Dictate
Add-ins
Design Suggestions
Copilot
Voice
Add-ins
Copilot
Copilot

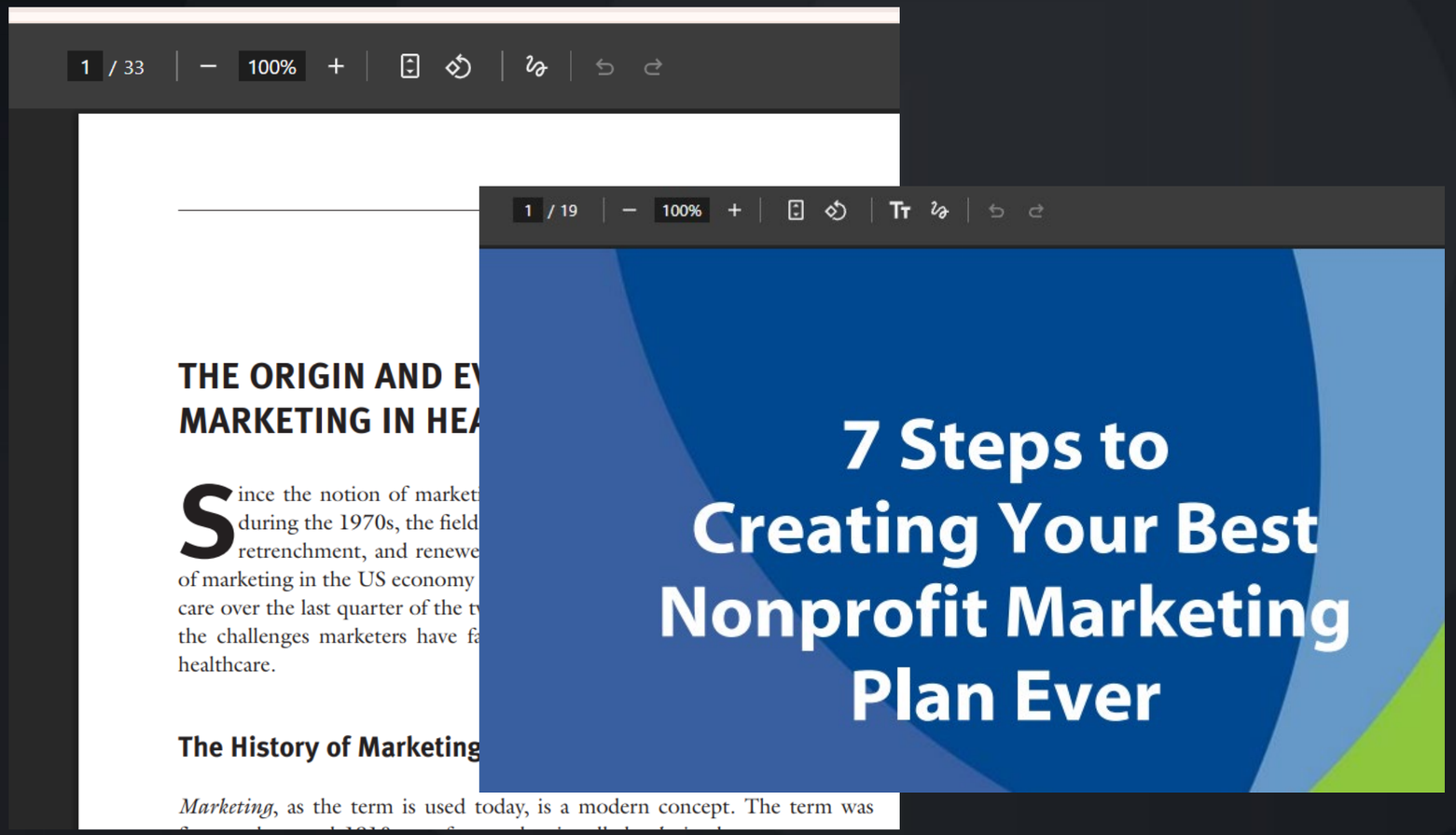
Microsoft


Formulas
Data
Review
View
Automate
Help
Acrobat
Conditional Formatting
Format as Table
Cell Styles
Styles
Cells
Editing
Add-ins
Add-ins
Analyze Data
Copilot
NOT(ISBLANK(B2)),C2>B2),NETWORKDAYS(B2,C2)-1,"")
D
E
F
G
H
I
Onboarding Duration
25
2
25
3
25
Get Deeper Analysis Results using Python
Explain this Formula
Suggest a Formula Column
Suggest Conditional Formatting
Summarize using PivotTable or Chart
Teach Me Something About Excel
Ask Copilot
Hide until I Reopen this Document

AI for
Documents

23 pages

- “Summarize this document.”
- “What are the key points in section 3?”
- “Extract the action items.”
- “Compare this spreadsheet with another.”



Thomas 3e Sample Ch-b3bb23d0.pdf
PDF

Advance-Healthcare-Pillars-of-Healthc...
PDF

OUW_whitepaper_marketing-healthca...
PDF

Extract the key points from these documents. Then create an infographic about the content

EVOLVE. ENGAGE. EMPOWER.

From Traditional Roots to a Digital-First, Patient-Centered Future

THE EVOLUTION OF HEALTHCARE MARKETING

THEN (Pre-1980s)

- Public relations focused
- Physician referrals dominated
- Limited competition
- No consumer focus

TRANSITION (1980s – 2000s)

- Rise of competition
- Advertising + branding emerge
- Patients gain choice
- Marketing becomes strategic

NOW (Modern Era)

- Retail disruption (CVS, Amazon, Walgreens)
- Digital-first consumers
- High patient expectations
- Data-driven, personalized engagement

THE MODERN HEALTHCARE CONSUMER

Researches online first → Compares options → Reads reviews & ratings → Expects convenience & easy access → Seeks trust & personalized care

ENGAGED PATIENTS GET BETTER RESULTS

3X HIGHER SATISFACTION

Engaged patients experience 3x higher satisfaction compared to those who are less engaged.

THE 4 PILLARS OF HEALTHCARE MARKETING

DATA IS THE FOUNDATION THAT POWERS EVERY PILLAR

1 BUILD

- Strong brand identity
- Professional website & digital presence
- Clear differentiation
- Consistent messaging

2 REINFORCE

- SEO & search visibility
- Online reputation (reviews & ratings)
- Local listings optimization
- Build trust & credibility

3 ENGAGE

- Content marketing (educate & inform)
- Patient communication (email, SMS, portals)
- Social media engagement
- Referral & word-of-mouth

4 MEASURE

- Analytics & tracking
- Performance measurement
- ROI evaluation
- Optimize & improve continuously

DATA — THE ENGINE

Patient Insights | Personalization | Smarter Targeting | Better Outcomes

Collect • Analyze • Activate • Improve

KEY SUCCESS FACTORS

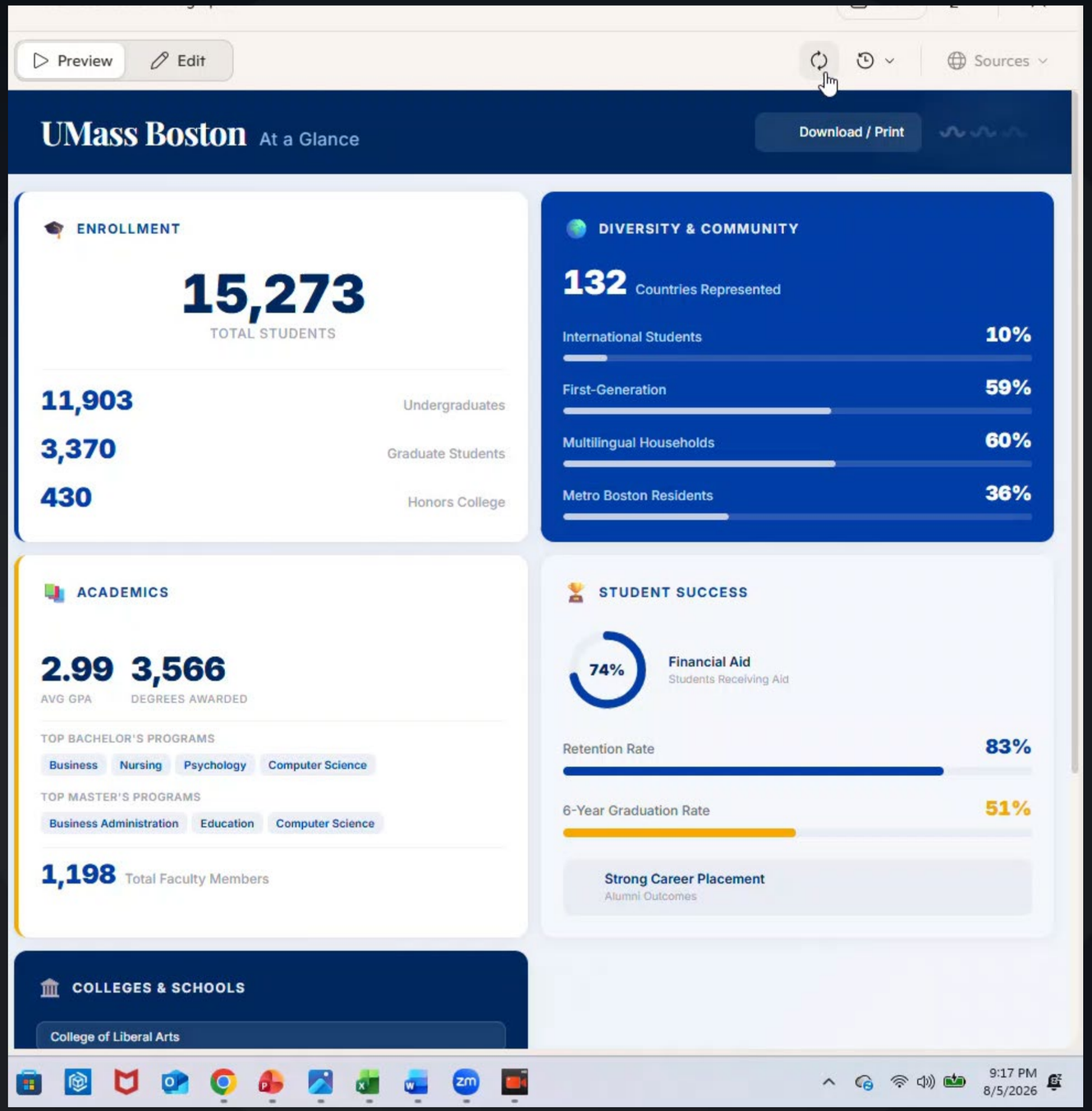
- Patient-first, always
- Strong online presence & visibility
- Trust, credibility & reputation
- Seamless patient experience
- Data-driven decisions & personalization
- Consistent engagement across channels

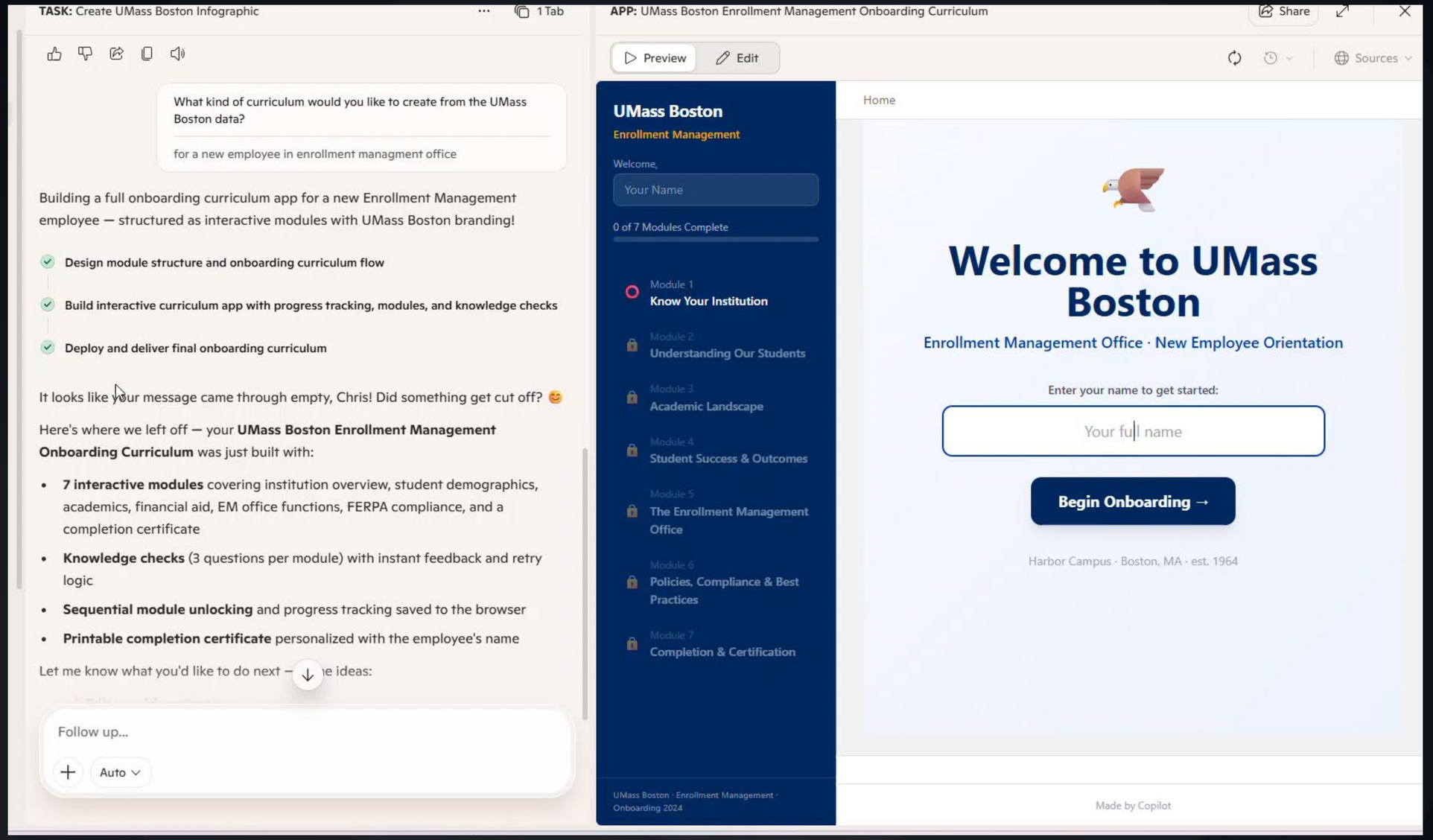
RISKS IF IGNORED

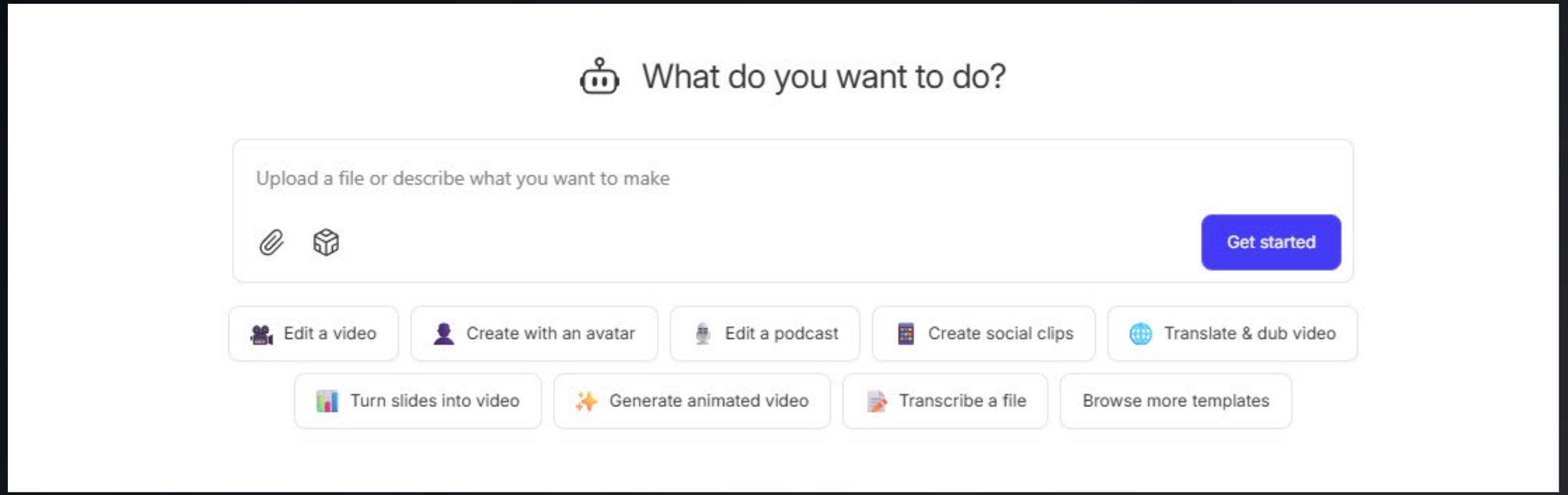
- Losing patients to competitors (retail & digital disruptors)
- Poor digital experience leads to patient loss
- Low visibility in search means fewer patients
- Negative reviews damage reputation & trust
- Declining patient loyalty & revenue

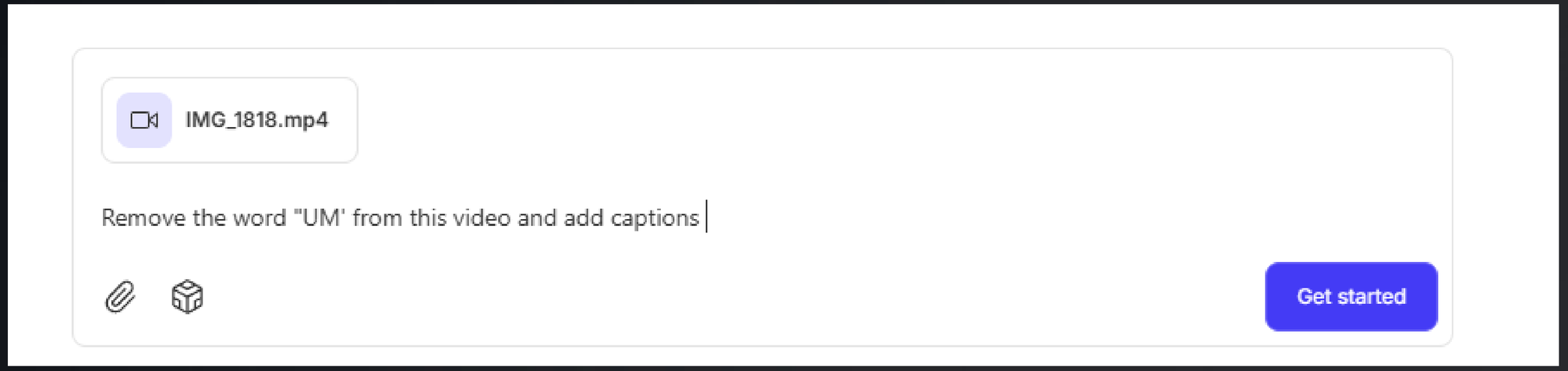
THE BOTTOM LINE

Healthcare marketing has evolved from provider-driven to consumer-driven. The future belongs to organizations that BUILD trust, REINFORCE visibility, ENGAGE patients, and MEASURE what matters—powered by DATA.


Preview
Edit
Sources
UMass Boston At a Glance
Download / Print
ENROLLMENT
15,273
TOTAL STUDENTS
11,903 Undergraduates
3,370 Graduate Students
430 Honors College
DIVERSITY & COMMUNITY
132 Countries Represented
International Students 10%
First-Generation 59%
Multilingual Households 60%
Metro Boston Residents 36%
ACADEMICS
2.99 AVG GPA
3,566 DEGREES AWARDED
TOP BACHELOR'S PROGRAMS
Business Nursing Psychology Computer Science
TOP MASTER'S PROGRAMS
Business Administration Education Computer Science
1,198 Total Faculty Members
STUDENT SUCCESS
74%
Financial Aid
Students Receiving Aid
Retention Rate 83%
6-Year Graduation Rate 51%
Strong Career Placement
Alumni Outcomes
COLLEGES & SCHOOLS
College of Liberal Arts
9:17 PM
8/5/2026


TASK: Create UMass Boston Infographic
1 Tab
What kind of curriculum would you like to create from the UMass Boston data?
for a new employee in enrollment managment office
Building a full onboarding curriculum app for a new Enrollment Management employee — structured as interactive modules with UMass Boston branding!
Design module structure and onboarding curriculum flow
Build interactive curriculum app with progress tracking, modules, and knowledge checks
Deploy and deliver final onboarding curriculum
It looks like your message came through empty, Chris! Did something get cut off? 😊
Here's where we left off — your UMass Boston Enrollment Management Onboarding Curriculum was just built with:
7 interactive modules covering institution overview, student demographics, academics, financial aid, EM office functions, FERPA compliance, and a completion certificate
Knowledge checks (3 questions per module) with instant feedback and retry logic
Sequential module unlocking and progress tracking saved to the browser
Printable completion certificate personalized with the employee's name
Let me know what you'd like to do next — e ideas:
Follow up...
Auto
APP: UMass Boston Enrollment Management Onboarding Curriculum
Share
Preview
Edit
Sources
UMass Boston
Enrollment Management
Welcome,
Your Name
0 of 7 Modules Complete
Module 1
Know Your Institution
Module 2
Understanding Our Students
Module 3
Academic Landscape
Module 4
Student Success & Outcomes
Module 5
The Enrollment Management Office
Module 6
Policies, Compliance & Best Practices
Module 7
Completion & Certification
UMass Boston · Enrollment Management · Onboarding 2024
Home
Welcome to UMass Boston
Enrollment Management Office · New Employee Orientation
Enter your name to get started:
Your full name
Begin Onboarding →
Harbor Campus · Boston, MA · est. 1964
Made by Copilot


What do you want to do?
Upload a file or describe what you want to make
Get started
Edit a video
Create with an avatar
Edit a podcast
Create social clips
Translate & dub video
Turn slides into video
Generate animated video
Transcribe a file
Browse more templates


IMG_1818.mp4
Remove the word "UM' from this video and add captions
Get started




descript

E-mails

- Most of the population checks their email as soon as it arrives (Aon Consulting)
- 43% of people check their email first thing in the morning (AOL Opinion Research)

1

Hi, I submitted an application for your food assistance program two weeks ago, but I haven't received an update. Could you confirm whether you received it and let me know what happens next?
Thanks,
Jennifer

2

Draft a warm, professional response to this community member. Acknowledge their concern, explain the next step using only the information provided, and don't promise a timeline or eligibility. If details are missing, leave a placeholder for staff to complete. End with a clear action the person can take.

Troubleshooting Claude: Get a Better Output

PROBLEM	WHAT TO TELL CLAUDE	PREVENT IT NEXT TIME
Too generic	**“Make this specific to the customer's objectives.”**	Share the customer's goals, industry and situation up front.
Too long	**“Reduce this by 40% without losing key information.”**	Set a length: “one page” or “five bullets.”
Incorrect information	**“Identify unsupported claims and verify against the source.”**	Attach the source and say “Use only this document.”
Wrong tone	**“Rewrite for a senior executive audience.”**	Name the audience and paste an example of the tone.
Missing details	**“Ask me five questions before continuing.”**	End with “Ask me anything you need before you start.”
Poor organization	**“Reorganize this into an executive summary and action items.”**	Give Claude an outline or template to follow.

CLAUDE QUICK REFERENCE · 2 OF 2

Troubleshooting Claude: Get a Better Output

PROBLEM	WHAT TO TELL CLAUDE	PREVENT IT NEXT TIME
Weak recommendations	**“Explain your reasoning, assumptions, and trade-offs.”**	Ask for two or three options with pros and cons.
Wrong direction	**“Start again using these revised requirements.”**	Correct early. After several misses, start a new chat.
Wrong format	**“Put this in a table with columns for team, action and due date.”**	Say where it's going: an email, a slide or a report.
Sounds like AI	**“Cut the filler and jargon. Write the way I would say it.”**	Paste a sample of your own writing to match.
Forgets earlier instructions	**“Summarize what we've agreed so far, then continue.”**	Start a new chat for each task. Save standing instructions in a Project.

Get it right the first time: include these four things

1. Context
Who, what and why it matters

2. Task
Exactly what to produce

3. Audience
Who will read it

4. Format
Length and structure

AI

as an assistant

What would you do?

Riley and Blake had discussed this problem at his six-month performance review and Riley accepted both his explanations and promises to do better. Although Riley met regularly with each member of the sales team, he made a point of meeting with Blake every month to review goals, strategies for sales, clients, and potential tactics for closing on each client.

It was now the end of Blake's second year and once again he has not met his goals. Riley was at a loss and was thinking he should terminate Blake's employment. He mentioned this to his sister who expressed concern that this could cause problems (both within the company, and potentially legally) if he fired Blake without documenting his shortcomings and developing an action plan for turning around his performance. Frustrated but unwilling to risk a lawsuit, Riley sat down to plan for what was likely to be a difficult performance evaluation with Blake. He knows this will not be a comfortable conversation but is determined to move forward to solve this problem.

Discussion Questions

1. What specific behaviors should Riley describe as missing or problematic in Blake's performance?
2. What should Riley require of Blake in the coming months?
3. What must Riley do in the coming months?
4. What consequences should Riley set if Blake fails to improve and how should these be communicated?

ALTERNATIVE WORDS WITH IMPACT

NEED	=	IMPORTANT
SHOULD	=	IMPERATIVE
MUST	=	NECESSARY
HAVE TO	=	CRUCIAL
OUGHT TO	=	BENEFICIAL

1. Content Creation & Patient Education

Healthcare marketers are often overwhelmed by the volume of content needed for blogs, social media, and patient portals.

Instead of saying...	Use this "Impact" word...	Healthcare MarCom Context Example
"You **need** to post more patient stories."	**Important**	
"We **should** use AI to draft our newsletter."	**Imperative**	

2. Crisis Comms & Public Relations

In healthcare, a PR crisis can happen in minutes. Using "stronger" words helps MarCom leaders feel in control of the narrative.

- **Must → Necessary:**
  - *Instead of:* "We **must** respond to this negative review."
  - *Try:* "Providing a prompt, HIPAA-compliant response is **necessary** to maintain our reputation for patient-centered care."
- **Have to → Crucial:**
  - *Instead of:* "We **have to** fact-check this AI medical blog."
  - *Try:* "Subjecting AI-generated medical content to a rigorous clinical review is **crucial** for ensuring patient safety and brand authority."


What can I do for you?

Prompt:
Write a 20-second voicemail for a Global Account Director reaching out to a VP of Events at a biot k, and one clear next step.

Voice Use

1

Prompt:
Write a 20-second voicemail for a marketing leader at a nonprofit reaching out to a local community partner or organization.

Include:
one credibility marker
one curiosity hook
one clear next step

2

Hi Sarah, this is Lisa from Valley Community Nonprofit.
We serve people across the region and work closely with local organizations to help improve community health awareness and access to care.
I’m reaching out because we’re seeing more residents looking for trusted, local healthcare information—and strong community partnerships are becoming even more important.
I’d love to connect briefly and explore how we might collaborate. Would you be open to a quick 10-minute call this week? My number is [###-###-####].

"Act as a hotel sales manager I'm calling cold. I'm a HelmsBriscoe Associate who heard your property just completed a $12M renovation. I need you to play the hotel contact and I'll practice leaving a compelling 20 second voicemail. Then give me feedback on my delivery."

Voice Use (Role Play)

Use your own
style, tone, and information!

Act as a candidate interviewing for a HR leadership role at a nonprofit organization. Conduct a realistic interview with me.

Respond to my questions as a candidate would, and demonstrate strong, average, and weak answers when appropriate.

After each response, briefly explain why the answer is effective or where it falls short.

Challenge me on:
How well candidates articulate leadership accomplishments

Clarity and depth of responses to behavioral questions

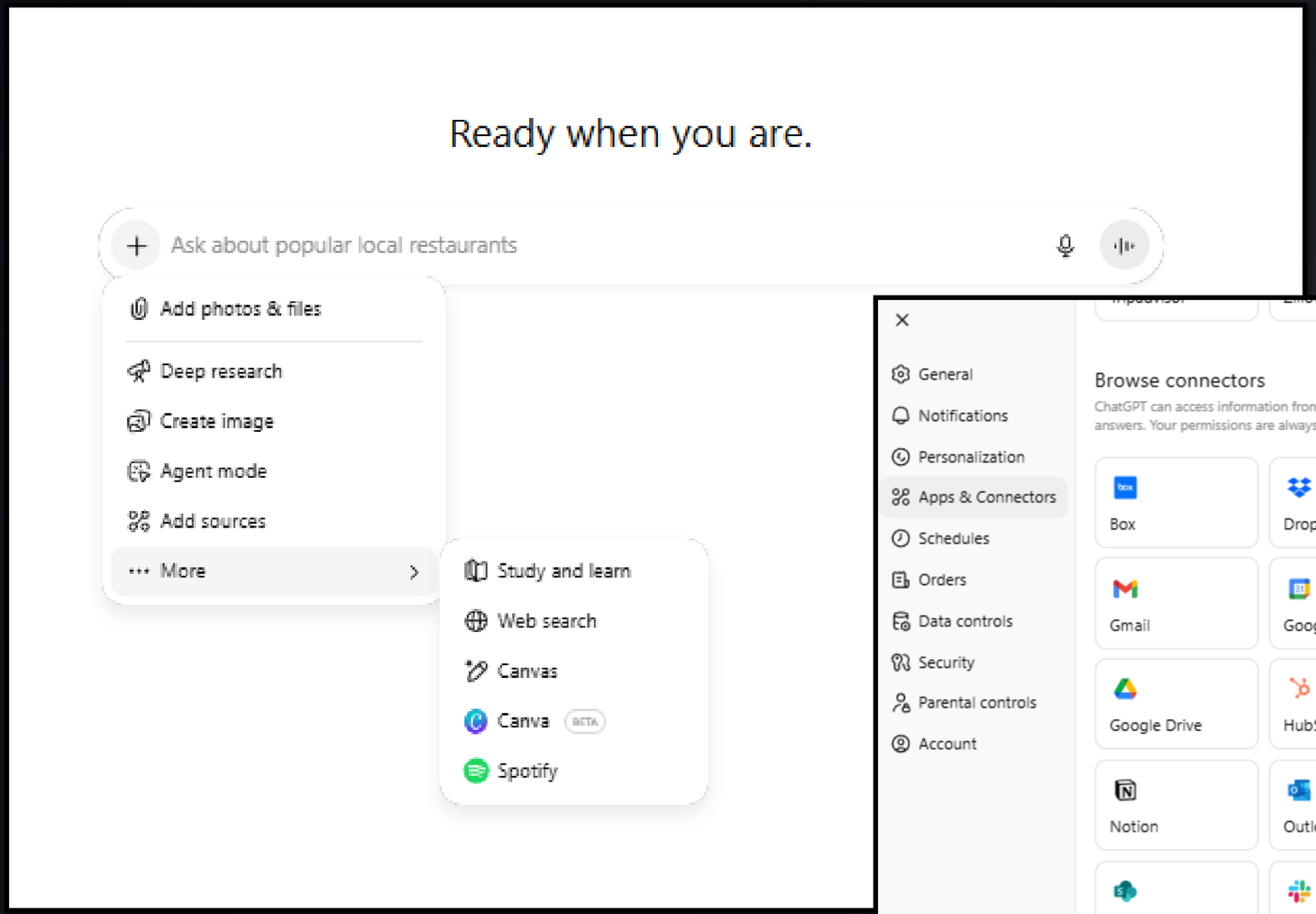
Understanding of healthcare workforce challenges (staffing, burnout, retention, compliance)

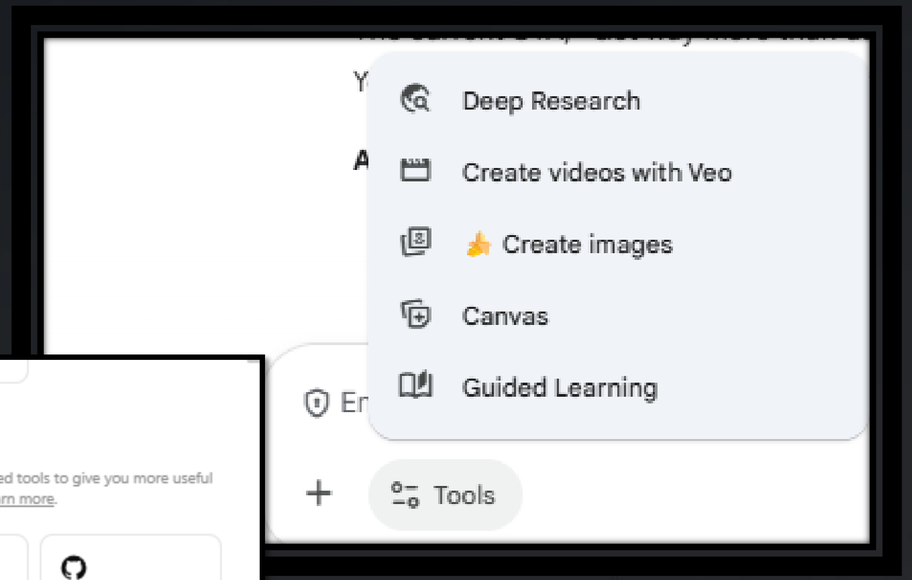
Ability to explain how they would use AI in HR operations

Confidence, structure, and communication style in answers

What role play scenarios would be useful for your nonprofit?

IT’S MORE THAN QUICK ANSWERS





Agent mode

“This file contains my presentation. Please let me know what techniques are outdated”



2026 Nonprofit Sector Outlook: Predictions and Priorities for Boards, CEOs, CFOs, and Controllers

BLOG POST 6 min read

Navigating 2026: A Year of Financial Foresight and Mission Discipline

Work mode

Analyze this article from the perspective of a nonprofit leader. Identify how these trends could create demand for what we offer



1. Demand for Unified Community Impact & Outcome Data

- **The Trend:** Donors and boards are demanding rigorous, data-backed evidence linking dollars spent directly to measurable impact. Individual grassroots nonprofits often lack the budget or analytical infrastructure to build complex KPI dashboards and measurement frameworks on their own.
- **United Way Opportunity:** United Way's role as an **aggregator and evaluator of regional impact** becomes highly attractive. We provide vetted community metrics, research (such as ALICE reports), and standardized program evaluation frameworks. Small-to-midsize nonprofits can leverage our credibility, while corporate donors and family foundations will look to United Way to ensure their giving delivers verified, measurable returns.

2. Demand for Corporate Social Responsibility (CSR) and Workplace Giving Infrastructure

- **The Trend:** Giving remains volatile and uneven, forcing organizations to diversify revenue through recurring giving and structured partnership models.
- **United Way Opportunity:** Employers seeking simple, high-trust ways to engage employees in recurring philanthropy rely heavily on United Way's **workplace campaign infrastructure**. We offer companies turnkey CSR platforms, payroll deductions, and vetted local distribution, which removes the administrative burden from corporate HR/ESG teams while delivering predictable, recurring unrestricted dollars to local causes.

HR/ESG teams while delivering predictable, recurring unrestricted dollars to local causes.

3. Demand for Centralized Navigation & Safety-Net Coordination (211 Services)

- **The Trend:** Persistent inflationary pressure and elevated operating costs continue to stress household budgets, increasing the volume of community members seeking food, utility, housing, and healthcare support.
- **United Way Opportunity:** Grassroots service agencies facing staff shortages and rising overhead cannot each manage 24/7 intake and referral desks. United Way's **211 network** functions as the essential utility for community navigation, reducing call volume and triage costs for frontline agencies while providing real-time data on emerging community needs to city planners, health systems, and funders.

4. Demand for Coalition Building and Funder Collaboration

- **The Trend:** Nonprofits are advised to build resilience by moving away from operational silos and embracing joint models, shared capacity, and cross-sector alignment.
- **United Way Opportunity:** As a backbone organization, United Way is uniquely structured to lead **collective impact initiatives and collaborative grantmaking**. Local funders (community foundations, municipal agencies, private donors) can pool funds with United Way to support cross-agency interventions (e.g., early childhood education, workforce development) that no single agency could fund or execute independently during tight fiscal conditions.

Strategic Positioning for United Way Leadership

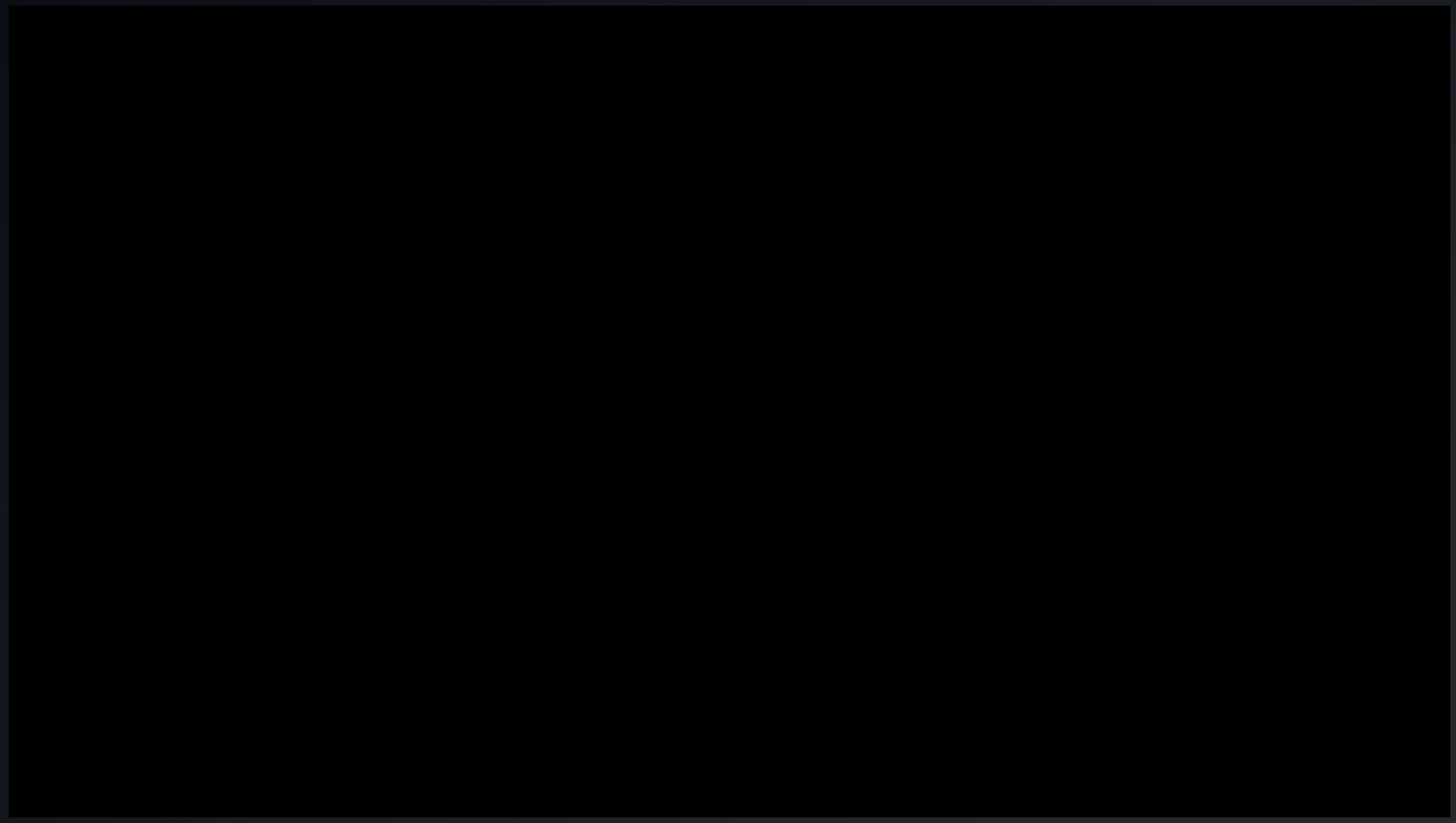
To capture this demand, United Way should frame its messaging to corporate partners and community foundations not merely as an annual fundraiser, but as:

1. **A Risk-Mitigation Partner:** Vetting community partners and managing compliance so

Custom Gems


Outreach specialist
Craft personalized messages to potential customers, build relationships, and drive engagement.
Write a message to a new customer informing them about a new product
Write a follow up email to a customer with an upcoming renewal
Draft an email invitation for an upcoming event to send to a list of qualified leads
Give me some tips on how to craft compelling messages to my customers
Recent
Museum Outreach Strategy Development

Meetings



1

Create a 20 -minute meeting agenda to review event needs of client

2

ChatGPT gives you:

- A clean agenda
- Discussion time limits
- Decision checkpoints
- Clear expectations

📌 *This reduces rambling, side conversations, and unclear priorities.*

1

RANDOM NOTES

Spring fundraiser planned for May 16, with room for 200 attendees
Last year, 145 people attended and the event raised $18,000
This year's fundraising goal is $25,000
A local bank is considering a $5,000 sponsorship; approval is pending
12 volunteers are needed; 4 have confirmed
Registration is planned to open April 1

2

"Summarize our event meeting notes into:

- Key points
- Decisions made
- Action items with owners and due dates

Keep it clear and client-focused."

3

Key Points

Development team: Follow up with the bank about sponsorship approval. **Due: Friday**
Volunteer coordinator: Recruit 8 additional volunteers. **Due: April 10**
Communications team: Prepare outreach to past donors and community partners before registration opens. **Due: April 1**



AI CONTENT

What Does AI Say About You?

“Better Data, More Power”

Tell me about United Way Orange County

United Way of Orange County, Texas is a local nonprofit that raises money, supports community organizations, and connects residents with local resources. Its focus areas are healthy communities, youth opportunity, financial security, and community resilience.

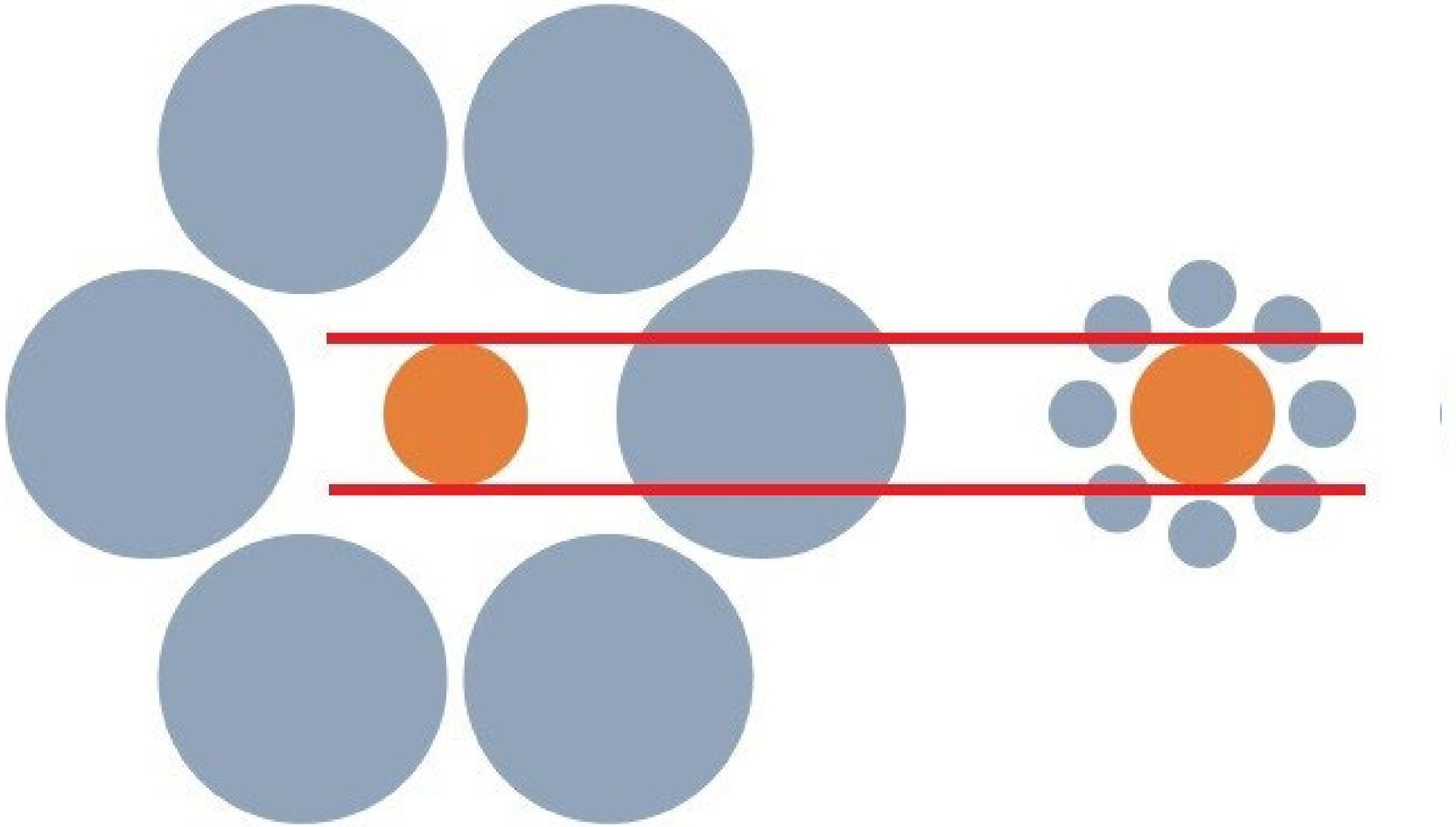
How is AI Educating Your Customer?

What should I consider when choosing a nonprofit to donate to?

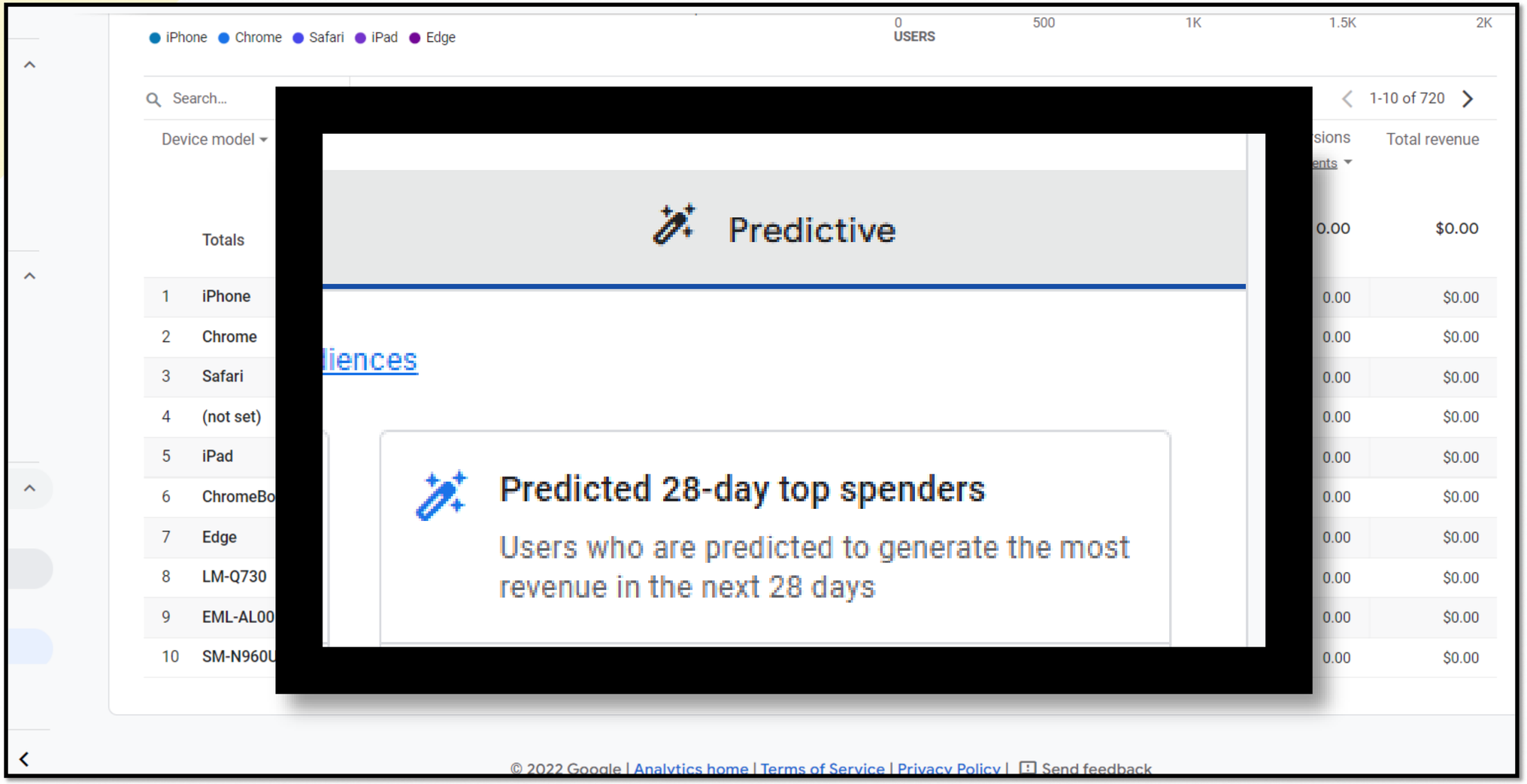
Choosing a nonprofit to support involves evaluating both personal alignment and organizational integrity:

- **Mission Alignment and Focus:** Determine whether the organization's mission directly addresses the issue you care about. Review their specific programs and target communities rather than just their general cause.
- **Measurable Impact vs. Activity:** Look for concrete evidence of outcomes rather than simple output. A reliable charity measures long-term results (e.g., permanent reductions in disease incidence or sustained literacy rates) rather than just activities completed (e.g., number of pamphlets distributed).
- **Financial Health and Efficiency:** Check how funds are allocated. Healthy nonprofits typically direct the majority of their budget (often 70% or more) toward program activities, keeping administrative and fundraising costs reasonable. However, avoid the "overhead myth"—adequate spending on infrastructure, skilled staff, and reporting is essential for effectiveness.
- **Transparency and Governance:** High-quality organizations publish recent annual reports, independent audits, board of directors lists, and tax filings (such as IRS Form 990 in the US) on their websites. An active, independent board of directors indicates sound governance.
- **Third-Party Ratings:** Verify the nonprofit on objective charity evaluation platforms:
  - **Charity Navigator:** Evaluates financial health, accountability, and transparency.
  - **Candid (formerly GuideStar):** Provides seals of transparency and public filings.
  - **GiveWell:** Conducts in-depth, cost-effectiveness analyses primarily focused on global health and extreme poverty.
  - **BBB Wise Giving Alliance:** Assesses adherence to 20 comprehensive standards for

“Better Data, More Power”



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1-10 of 720
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2 Chrome
3 Safari
4 (not set)
5 iPad
6 ChromeBo
7 Edge
8 LM-Q730
9 EML-AL00
10 SM-N960U
Predictive
iences
Predicted 28-day top spenders
Users who are predicted to generate the most revenue in the next 28 days
© 2022 Google | Analytics home | Terms of Service | Privacy Policy | Send feedback

Best times to post

Platform	Best days	Be es (local)
Instagram	Thu	9:00 PM
		:00–9:00 AM
Facebook	Tue–Fri	12:00–1:00 PM
		6:00–8:00 PM
LinkedIn	Tue	:00–10:00 AM
TikTok	un	0:00 PM
Saturday	urday	9:00–11:00 AM
Sunday	Sunday	6:00–8:00 PM

1. Early Morning: 7:30 AM – 9:00 AM

- Executives and investors check content **before meetings start**
- High-quality engagement (not just scrolling)
- Ideal for:
  - Market insights
  - Capital trends
  - Thought leadership

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2. Midday Window: 11:30 AM – 1:00 PM

- Lunch scroll + lighter cognitive load
- Good for:
  - Case studies
  - Deal highlights
  - Visual content (charts, before/after, project updates)

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3. Late Afternoon: 4:30 PM – 6:00 PM

- Wind-down period → more reflective engagement
- Strong for:
  - Strategic insights
  - Commentary on trends
  - "What this means" type posts

📊 Platform-Specific Strategy

LinkedIn (Primary Channel)

- **Best:** Tue–Thu at 8 AM or 12 PM
- Why: Real estate investors, PE professionals, and operators are highly active here
- Focus:
  - Capital allocation trends
  - AI in real estate (your strong angle)
  - Deal strategy / market shifts

Instagram / Facebook (Secondary)

- **Best:** 11 AM – 1 PM or evenings (6–8 PM)
- More visual / brand positioning
- Use for:
  - Property visuals
  - Behind-the-scenes
  - Culture / credibility

X (Twitter) (If used for finance audience)

- **Best:** 7–9 AM + 12 PM
- Works well for:
  - Quick takes on market trends
  - Interest rate commentary
  - Data center / logistics / CRE shifts

📈 Advanced Strategy (What Most Firms Miss)

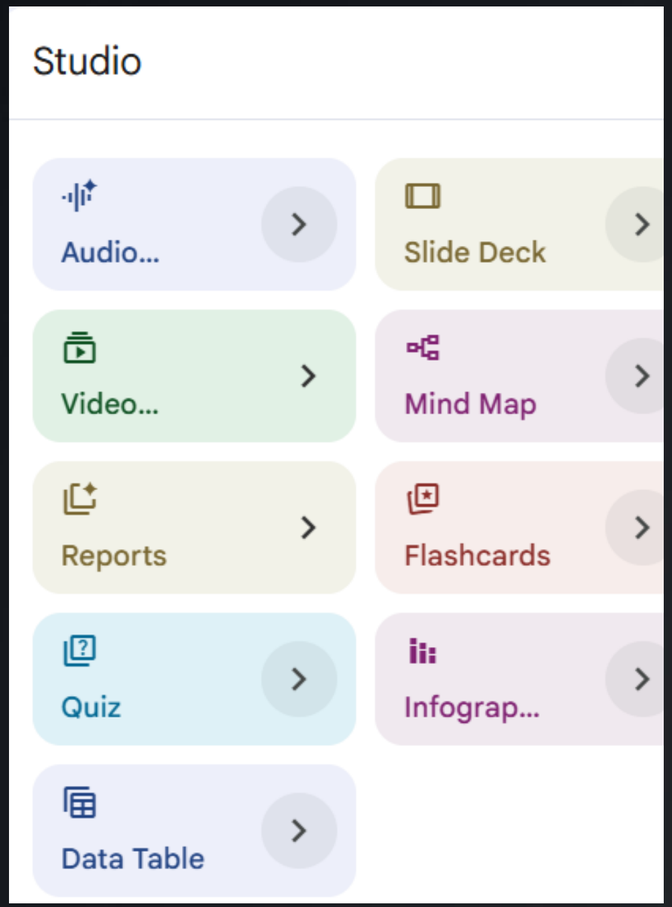
1. Post Before Industry Events / News Cycles

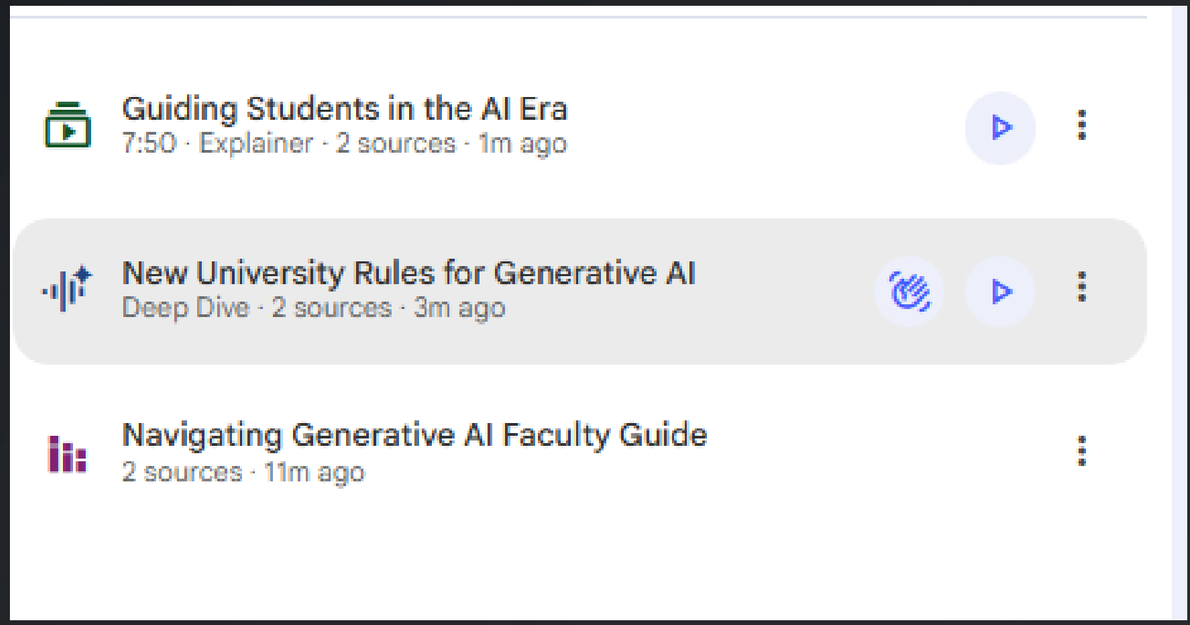
- Example:
  - Before Fed announcements
  - Before major CRE reports (CBRE, JLL releases)
- You capture **search + discussion momentum**

Here's my last email to a client who hasn't responded in 8 days. Write 3 follow-up versions:
Di
Va
Re

NotebookLM

EDUCATE + REPURPOSE!!






01
AI Foundation
02
Research Process
03
Accuracy and Bias
04
Intellectual Property
05
Publication Ethics
NotebookLM

Navigating Generative AI:

A Faculty Guide to Academic Integrity & Ethics

While AI can assist in brainstorming and editing, students remain accountable for the accuracy and originality of their final submissions.

Best Practices for AI in Research



Use AI as a Brainstorming Partner

Encourage students to use AI for generating ideas or surveying literature as an initial overview.



Prioritize Prompt Engineering

Teach students that the quality and precision of their prompts directly determine the result's value.

Ethics and Citation Standards



Mandatory Citation and Attribution

All AI-generated text, images, or ideas must be cited using MLA, APA, or Chicago styles.

Protect Data Confidentiality



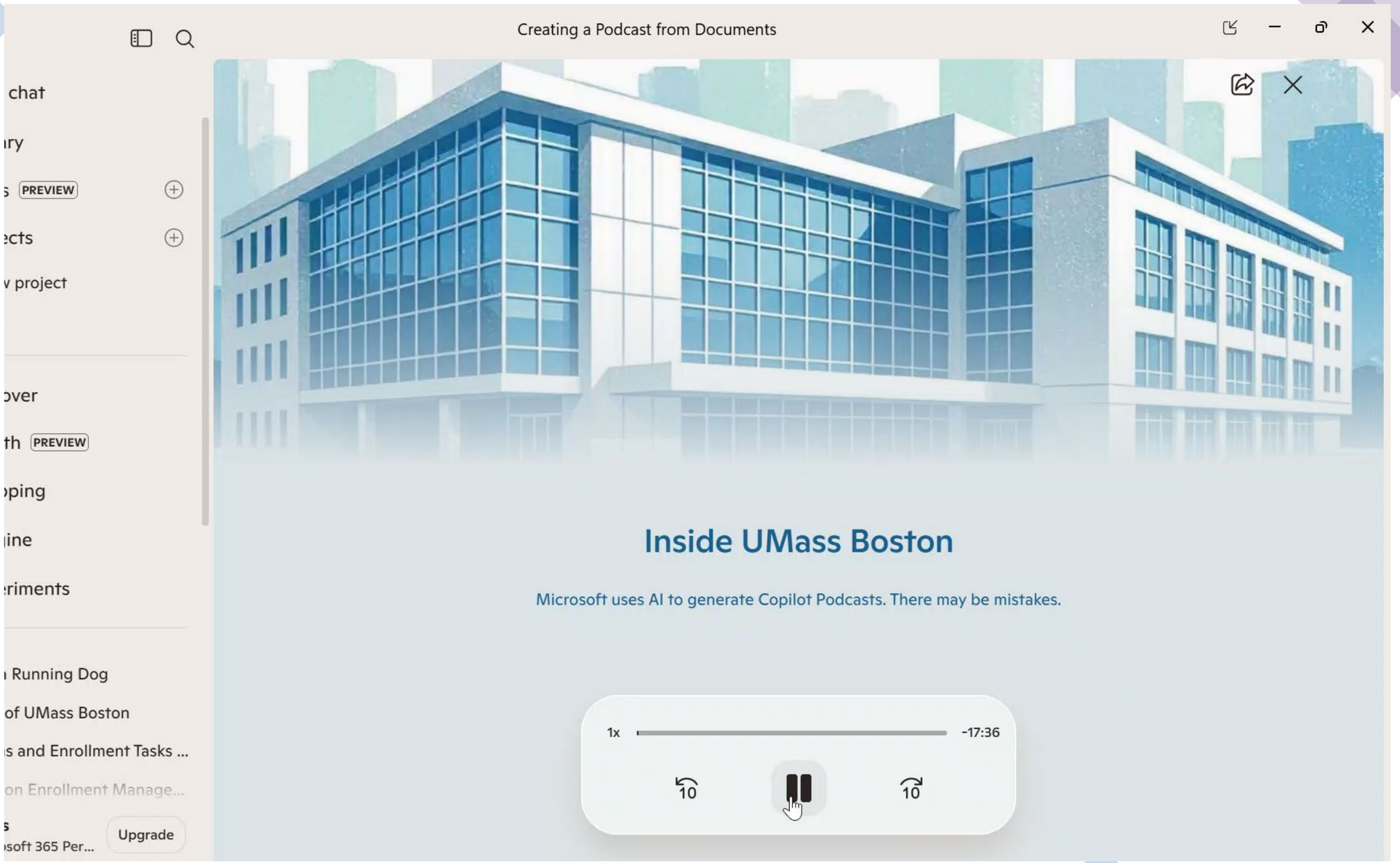
Warn students never to upload personally identifiable or proprietary research data into open AI platforms.



AI-Generated Text as Plagiarism

Representing AI-generated content as one's own original work constitutes a violation of academic integrity.

Citation Requirements for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Inside UMass Boston
Microsoft uses AI to generate Copilot Podcasts. There may be mistakes.
1x
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10




Veo



MAKING AN IMPACT

United Way mobilizes communities to action so all can thrive. True to our founding spirit, whenever there is a need in our communities, United Way is there. We bring a comprehensive approach to every challenge, actively listening and responding to local needs.



Healthy Community

Improving health and well-being for all



Youth Opportunity

Helping young people realize their full potential



Financial Security

Creating a stronger financial future for generations



Community Resiliency

Addressing urgent needs today for a better tomorrow

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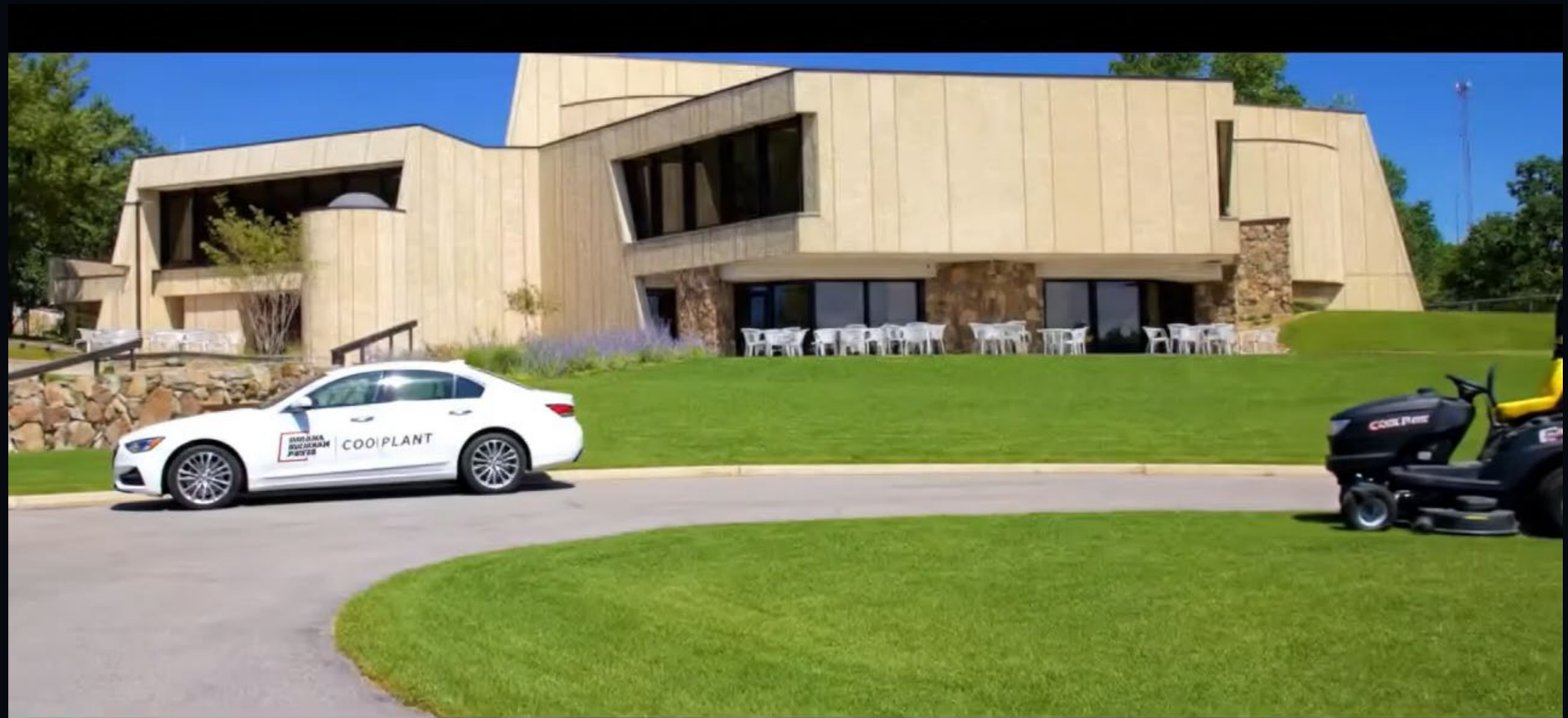
Community Resiliency

Addressing urgent needs today for a

AI Gets it Wrong!

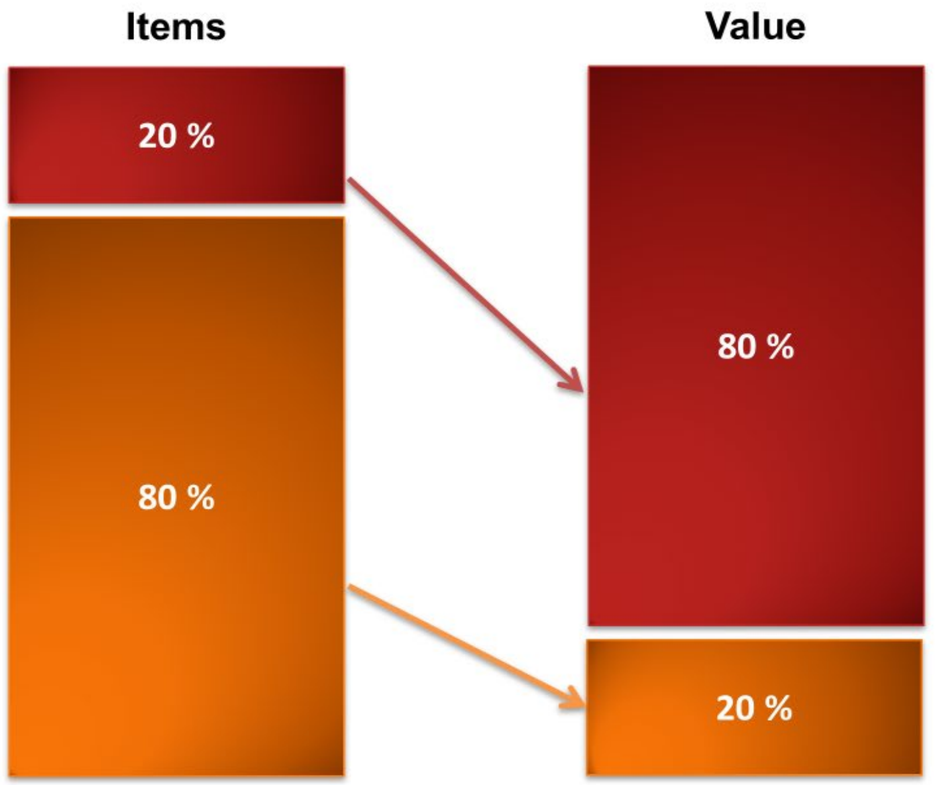
Bad prompting means Bad output




Who?
Past Experiences
Lifestyle
Wants
Motivations


30
60
90

80/20 Rule



what overthinking looks like 😂



LR TRAINING SOLUTIONS

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