

AI for Impact:

Practical strategies to expand your mission, reach and results.

Welcome



Agenda

Welcome and Housekeeping

Greg Bradbard, CEO IEHP Foundation

Practical AI & Data Tools for Nonprofits

Brian Romo, Director of Public Policy & Technology Inland Empire Community Collaborative (IECC)

Break / Table Discussions

AI Innovation in Action

Tim Ney, CEO, Catholic Charities San Bernardino & Riverside Counties & Matt Kill, HyperBolt Inc.

Panel Discussion: Utilizing AI Today to Improve Operation Efficiency

Andrea Mitchel, Vice President AM Development Group

Chris McMasters CIO City of Corona

Nathan England, President Kiva Container Corporation

Moderator Greg Bradbard, CEO IEHP Foundation

Closing Remarks

Deanna Hendrick, Communications & Public Affairs Manager IEHP Foundation

Opening Remarks

Greg Bradbard
CEO IEHP Foundation



IN THE ROOM

- 2020 Vision Youth
- Academy for Grassroots Organizations
- Alzheimer’s Association California Southland
- Aquamotion Ability Foundation
- Barstow College Foundation
- Benevolence Health Centers
- Bethel Living THPP
- Beyond Your Spectrum
- Big Brothers Big Sisters
- Birth and Family Support Services of the Inland Valley
- Black Voices of the Valley
- Blindness Support Services
- Blueprints and Pathways
- Boys & Girls Clubs of Greater Redlands–Riverside
- Boys Republic
- CASA of San Bernardino County
- Catholic Charities San Bernardino & Riverside
- Cedar House Life Change Center
- Center Against Racism and Trauma
- Centro Immigrante
- Children’s Fund
- Chino Valley Chamber of Commerce
- Christian Development Center
- City of Riverside Parks & Recreation
- Civil Rights Institute of Inland Southern California
- Community Health Systems, Inc.
- Community Health Action Network
- Community in Unity for Better Living & Wellness
- Compass Connections
- Compassion Center
- Corona–Norco Family YMCA
- DAP Health
- Desert Sanctuary
- Divine Truth Unity Fellowship Church
- Dreams Training Facility
- Elder Love USA

- El Sol Neighborhood Educational Center
- Empower You Edutainment
- Fair Housing Council of Riverside County
- First 5 San Bernardino
- Foothill Family Shelter
- Galilee Center
- Galán Cultural Center
- Genetic Care 360
- Girls on the Run Inland Empire
- Give for a Smile
- Giving 365
- Greater Ontario Business Council
- Growing Outreach Growing Opportunities
- GuudSeed Initiative
- Habitat for Humanity Inland Valley
- Health Career Connection
- Health Bridge Community
- Heritage Health Network
- Heritage Wellness Collective
- Hillsides
- High Expectation Development Corporation
- IEHP
- IECC (Inland Empire Community Collaborative)
- Inland Behavioral Healthcare Center
- Inland Counties Legal Services
- Inland Empire Health Information Organization
- Inland Housing Solutions
- Inland SoCal United Way
- Joslyn Center
- Just Us 4 Youth
- Kairos Impact Strategies
- Loma Linda University Health
- Love Your Best Life Foundation
- Making Hope Happen Foundation
- Microenterprise Collaborative of Inland Southern California

IE VIBRANT HEALTH FORUM

- Mission Hope
- Moses House Ministries
- NPO Centric / RAP Foundation
- Neighborhood Partnership Housing Services (NPHS)
- Oak Grove Center
- Operation New Hope
- Parktree Community Health Center
- Pc4ej
- Project Boon
- Project KIND
- Reach Out
- Renewing Hope Strategies
- Riverside County IHSS Public Authority
- Riverside Unified School District Foundation
- RUHS / RUHS–CHC
- SAC Health
- SAFE Family Justice Centers
- San Marcos Medical Group
- SBX Youth & Family Services
- Special Needs Network
- St. John’s Community Health
- The Abina Group
- The River’s Edge Ranch
- The Way Resource Center
- Turn It Around Family Wellness Center
- Ujima, Inc.
- Valley Restart Shelter
- Water of Life Community Church / CITYLINK
- With Open Arms, Inc.
- Women Organizing Women
- Worth Advisors
- Young Visionaries Youth Leadership Academy



IE VIBRANT HEALTH FORUM

AI for Impact

Practical AI & Data Tools for Nonprofits

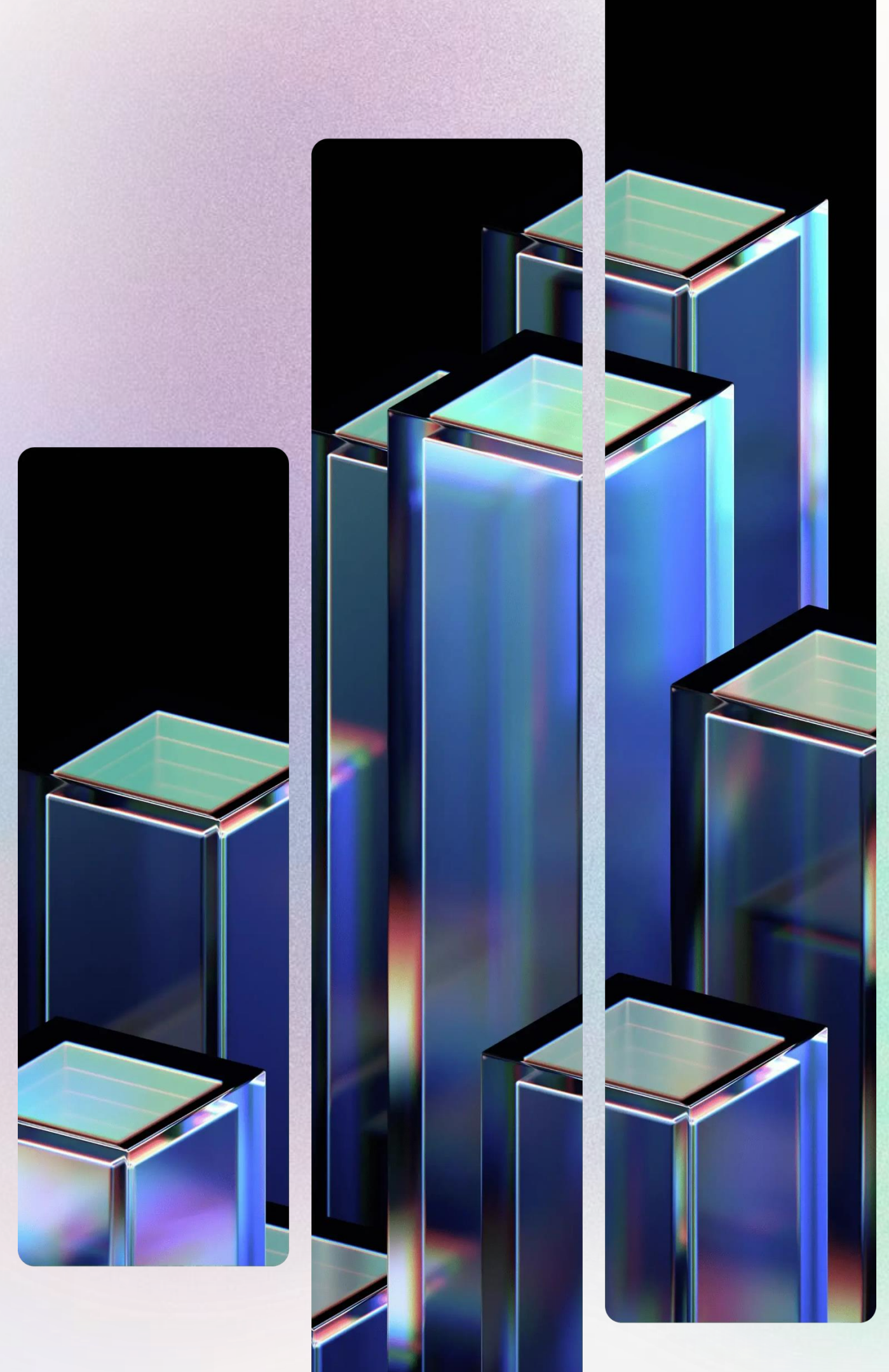
Brian Romo
Director of Public Policy & Technology
Inland Empire Community Collaborative



Practical AI & Data Tools for Nonprofits



Presented by:
Brian Thomas Romo, MPP
Inland Empire Community Collaborative



Session Objectives

This session will introduce practical ways nonprofits can use AI, data, and other digital tools to strengthen everyday work. Participants will learn how these tools can support planning, storytelling, grant work, and better decision-making without making things feel overly technical.



Understanding What AI is and is NOT

Define generative AI and its main applications.



Understanding Ethical and Social Implications

Discuss the ethical and social implications of using generative AI for nonprofit impact.



A Double Edged Sword for Good and Destruction

Explore the benefits and challenges of using generative AI for nonprofit purposes.



Becoming a AI Prompt Engineer

Practice generating text, performing data analysis using generative AI.

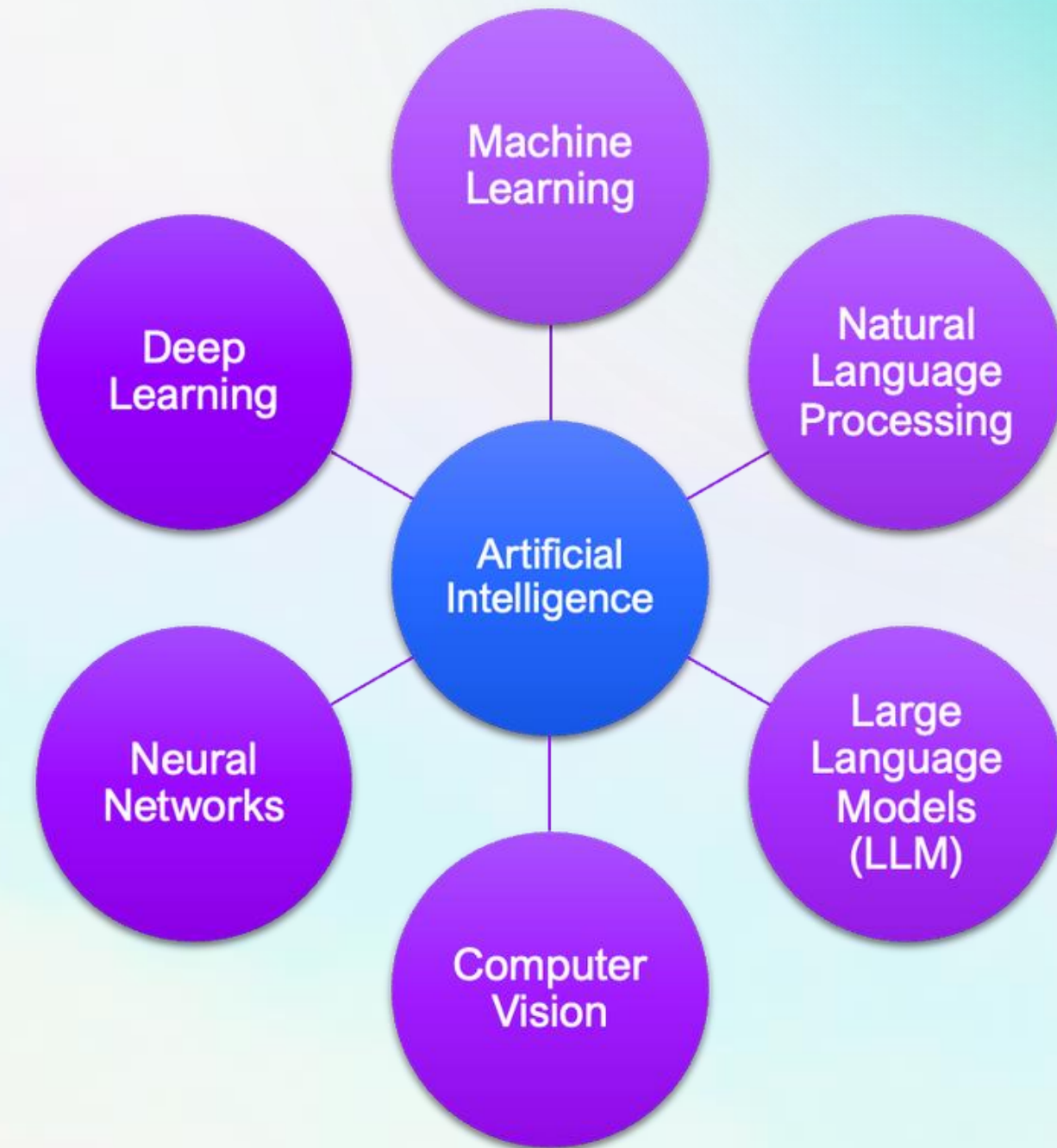
Today's Agenda

- 01 Introduction
- 02 What is AI?
- 03 Generative AI Tools and Platforms
- 04 Ethics and Bias in AI
- 05 Generative AI Policies
- 06 Demo: Microsoft Copilot + AI Agents
- 07 Q&A
- 08 Wrap-Up & Evaluation

WHAT IS AI?

The theory and development of computer systems able to perform tasks that normally require human intelligence, such as visual perception, speech recognition, decision-making, and translation between languages. These systems are carried out by GPTs (Generative Pre-trained Transformer).

In short: A lot of complex math and automations built on patterns, not understanding.



Source: What is AI? A beginner's guide to understanding AI, by Akash Takyar. Leeway Hertz. 2024. ([Link](#))

HOW CAN IT BE USED TO IMPACT THE NONPROFIT SECTOR?

This is not about becoming technical or replacing people; it's about reducing friction.

- How has it impacted your organization?
- How are you utilizing AI with your organization?
- How do want to use AI with your organization?

Streamline Content Generation

- Examples: Drafting social media posts, job descriptions, donor letters, reporting, summarize documents, draft emails, etc.

Conduct Data Analysis

- Example: Generate predictions about donor behavior by analyzing historical donation data to make informed fundraising decisions.

Reduce Time Grant Writing

- Example: Use AI to answer common questions about your organization based on application criteria.

GENERATIVE AI TOOLS AND PLATFORMS

There are various ways to use generative AI tools to generate text, images, documents, audio, video, and more.

List Source: Practical Guide to AI. Whole Whale. 2024.

([Link](#))

- Chat GPT or OpenAI (Text, Images, etc.)
- Anthropic.com (Text, Images)
- Microsoft Copilot (Text, Images, etc.)
- Google Gemini (Text, Images, etc.)
- DALL-E (Images)
- Canva.ai (Text, Images, etc.)
- StableDiffusion (Images)
- MidJourney (images)
- Replicate.com (Audio/Video)
- Change Agent AI (Text)

ETHICS & BIAS IN AI

Is using AI ethical?

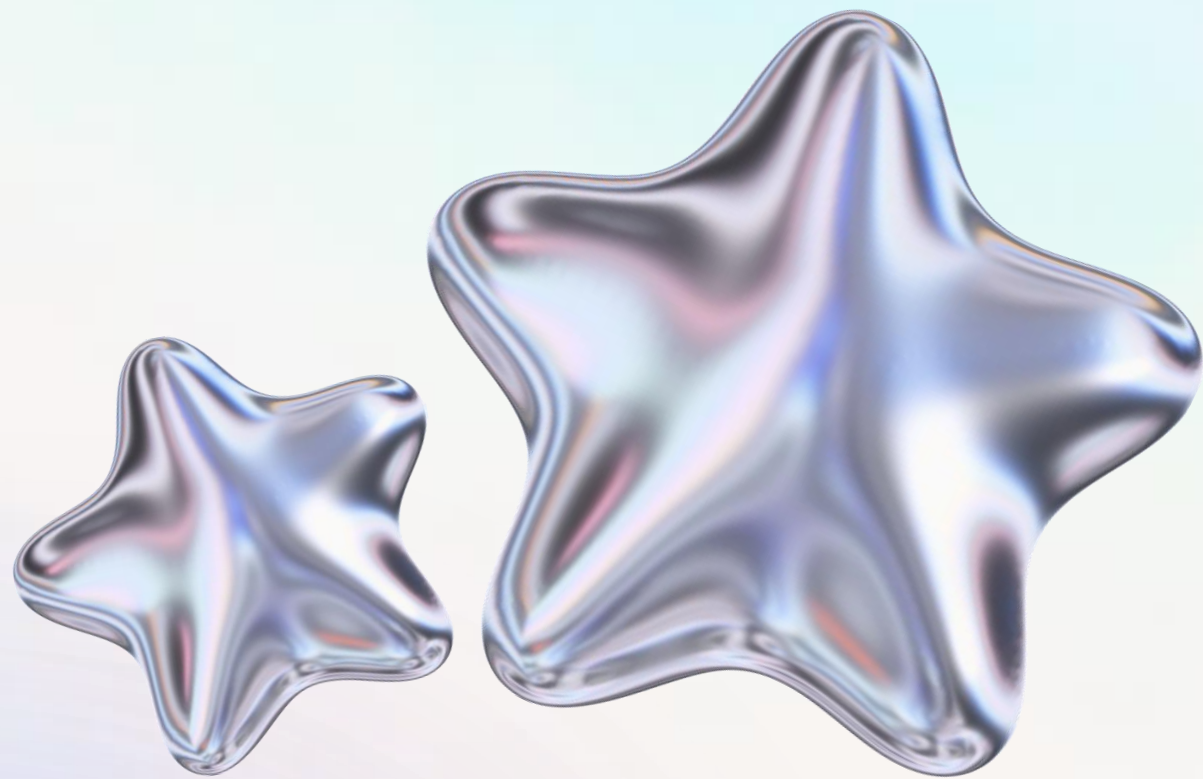
- Data Mining, Author/Artist Attribution, and Intellectual Property, Climate Impact, etc.
- What are the ethical and social issues that nonprofits need to consider when using generative AI?

What is bias?

- Bias is a tendency to lean towards or against something or someone, often in an unfair or unreasoned way. It can show up in our thoughts, decisions, and behaviors, sometimes without us even realizing it.



HOW CAN BIAS AFFECT YOUR WORK?



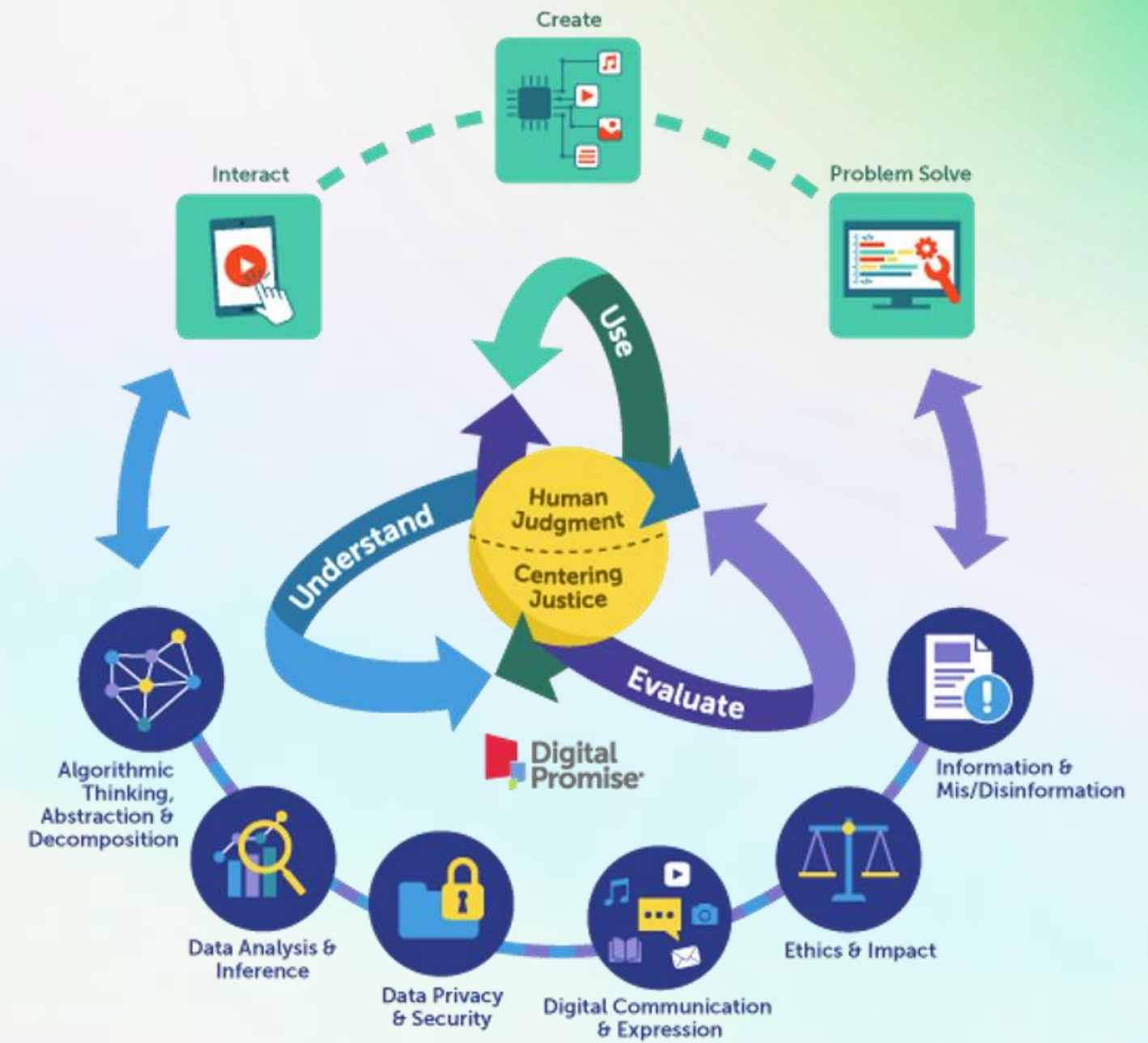
- **Perpetuating Inequality:** Machine learning models that include bias can help to perpetuate existing societal biases, creating a cycle where the bias is continuously reinforced.
- **Decision-Making Risks:** Biased algorithms can lead to costly errors and poor decision-making, which can pull projects and organizations in the wrong direction.
- **Legal and Ethical Issues:** Organizations may face legal challenges if their machine learning models result in biased decisions, and there are ethical concerns about the fairness and integrity of AI systems.

Sources:

1. Machine learning and bias, Tobias Baer and Vishnu Kamalnath. McKinsey & Company. November 10, 2017. ([Link](#)).
2. Controlling machine-learning algorithms and their biases, M. Tim Jones. IBM Developer. August 17, 2019. ([Link](#))

SAFETY AND SECURITY CONSIDERATIONS

- Careful with online AI tools using “wrappers” to collect data online with little infrastructure to safeguard your data from hackers or from being sold.
- Do not share personally identifying information, such as social security numbers or banking details, with any AI tool.



Source: AI Literacy: A Framework to Understand, Evaluate, and Use Emerging Technology by Kelly Mills et al. June 2024. ([Link](#))

ADOPTING GENERATIVE AI POLICIES

Policy for Acceptable Uses of Generative AI Platforms

For {nonprofit organization name}

Introduction

Generative AI platforms are tools that can produce text, images, audio, or video based on user input. They can be used for various purposes, such as content creation, education, research, entertainment, or communication. However, they also pose potential risks and challenges, such as ethical, legal, social, or technical issues. Therefore, it is important to establish a clear and consistent policy for acceptable uses of generative AI platforms for our nonprofit organization.

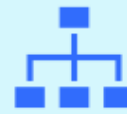
Scope

This policy applies to all staff, volunteers, partners, and beneficiaries of our nonprofit organization who use or access generative AI platforms for any work-related or personal purposes. This policy also covers any content or data that is generated, stored, shared, or published using generative AI platforms.

Objectives

The objectives of this policy are to:

- Ensure that generative AI platforms are used in a responsible, ethical, and lawful manner that aligns with our mission, vision, and values.
- Prevent or minimize any harm, misuse, or abuse of generative AI platforms or their outputs.
- Promote transparency, accountability, and quality of generative AI platforms and their outputs.
- Protect the privacy, security, and rights of our staff, volunteers, partners, beneficiaries, and



Platforms should meet organizational needs.



AI tools should be used to promote the mission of the organization.



Must meet ethical standards and organizational values.



Must be used carefully to protect privacy and security of sensitive information.



Establish guardrails and procedures for adopting generative AI platforms.



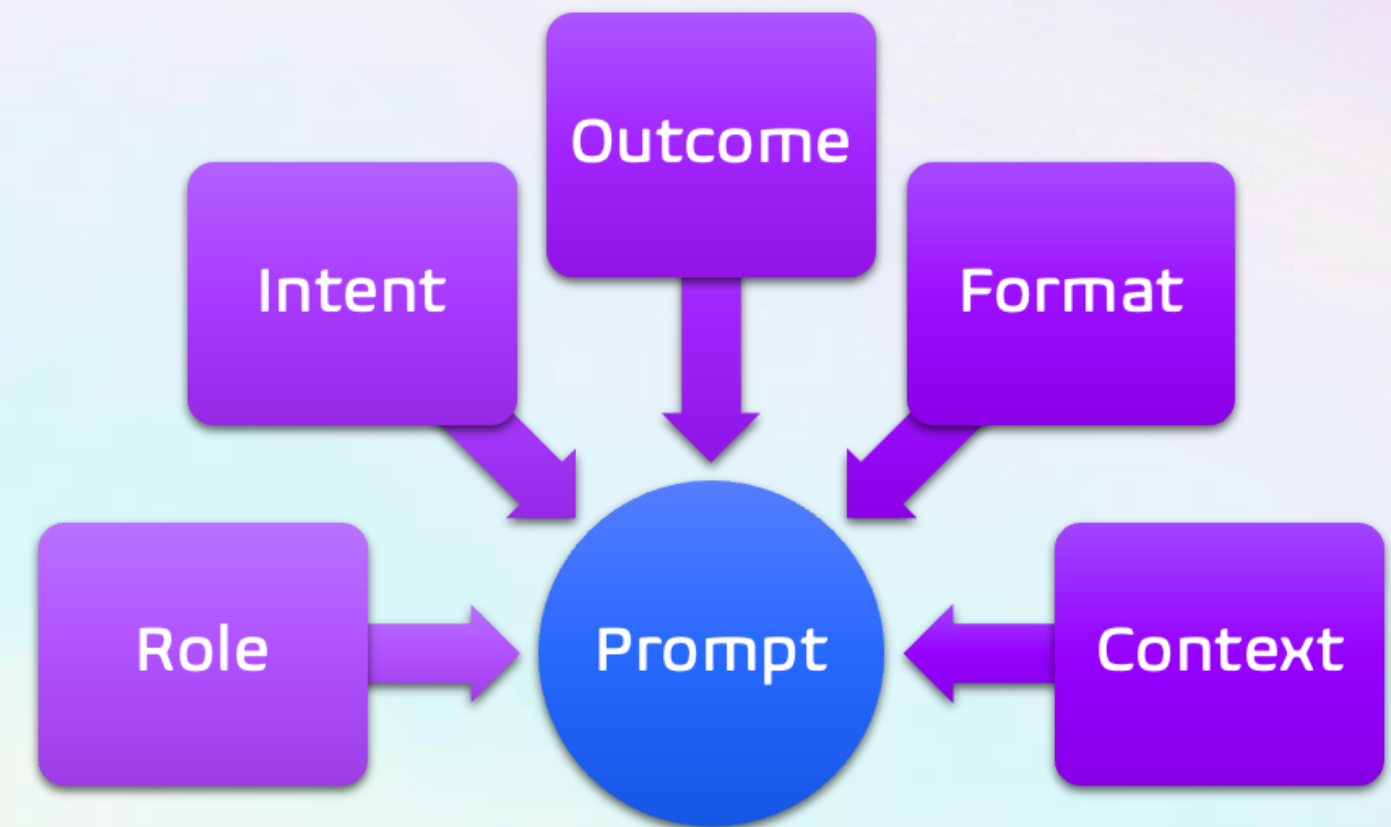
Encourage innovation, creativity, and learning with generative AI platforms.



Download by scanning or visiting bit.ly/thriveai-handouts

AI DEMOS USING MICROSOFT COPILOT

- How to craft a good prompt: Becoming a prompt engineer.
- Tasks to complete together:
 - a. **Write a report** on Advocacy Activities for the month.
 - b. Review Donation Data with AI to help **plan a fundraiser**.
 - i. Write individualized letters to donors.
 - c. **[Review]** Build an **AI Agent** to help build a knowledge base for a project.



Hey, Copilot! Let's get work done.

- a. Write a report.
- b. Plan a fundraiser.
 - i. Write individualized letters to donors.
- c. Build an AI Agent.

Demo



Thank You

Power in Practice

- **[Essential]** Sit with your staff and design an AI adoption strategy.
 - What values are important?
 - What security measures do we need to implement?
 - Draft AI policies for your organization.
- **[Beginner]** Use AI to summarize existing content
- **[Advanced]** Build an AI Agent using your existing data.



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Table Discussion 10 Minutes

- 1. What information, insight or uses of AI are you hearing that could be useful in your organization?**
- 2. What concerns or questions do you still have with utilizing AI at your organization?**

IE VIBRANT HEALTH FORUM

AI for Impact

AI Innovation in Action



Tim Ney
Chief Executive Officer
Catholic Charities San Bernardino
& Riverside Counties



Matthew Kill
Chief Executive Officer
HyperBolt Inc.



AI for Nonprofits

From busywork to mission work

Practical uses of AI + the Compassion Voice and CompassionCore 360 story

Matthew Kill, CEO — HyperBolt Inc. | Tim Ney, CEO — Catholic Charities San Bernardino & Riverside Counties

Matthew Kill

CEO, HyperBolt Inc.
AI technology + nonprofit solutions

Tim Ney

CEO, Catholic Charities San Bernardino & Riverside Counties
Nonprofit leadership + real-world implementation

Opening: 2–3 minutes each — who we are, why this work matters, and what we hope you take away.

The nonprofit AI opportunity

AI is most valuable when it gives people more time to do the work only people can do.

Communicate

Draft, summarize,
translate, personalize.

Serve

Answer, route,
schedule, follow up.

Operate

Intake, notes,
documents,
workflows.

Learn

Reports, trends,
outcomes, decisions.

The question is not “Where can we add AI?”

It is: “Where are staff, clients, and leaders losing time or information today?”

Start Monday: 6 low-risk, high-value uses

You do not need a custom platform to begin learning how AI can improve everyday nonprofit work.

Meeting → action

Summarize notes; create owners, deadlines and follow-up.

First drafts

Grants, donor emails, job descriptions, SOPs, board memos.

Translation & accessibility

Plain-language rewrites and multilingual first drafts.

Research synthesis

Turn long reports or policies into decisions and questions.

Data storytelling

Explain trends and turn metrics into funder/board narratives.

Workflow design

Map a process, find waste, then automate repeatable pieces.

Create an AI ethics & acceptable-use policy

Before scaling AI, decide as an organization where it is appropriate, where human review is required, and where it will not be used.

1. PURPOSE

What outcomes may AI support?

Efficiency • access • communication • analysis

2. DATA & PRIVACY

What information may be entered?

Approved tools • confidential data • retention

3. HUMAN ACCOUNTABILITY

What requires review or approval?

Staff remain responsible for decisions and outputs

4. PROHIBITED USES

Define the red lines.
No autonomous high-stakes decisions or unsafe use

5. TRANSPARENCY

When should staff, clients, boards or funders know AI was used?

6. REVIEW & TRAINING

Train staff, monitor results, address bias, and update the policy as tools change

The goal is not to stop experimentation. It is to make responsible experimentation part of your culture.

Compassion Voice: from phone call to client-scheduled appointment

Sarah, our AI voice assistant, helps the caller identify the service they need — then puts appointment scheduling in the client's hands.

1

CLIENT CALLS

Sarah answers the call and the client chooses a language.

2

CLIENT STATES THE NEED

The caller explains why they are calling — for example, “I need food.”

3

SARAH IDENTIFIES

LOCATION Sarah asks where the client is located so she can match the correct geographic service area.

4

SARAH TEXTS A LINK

The client receives a link for the appropriate service and location.

5

CLIENT SCHEDULES

The client chooses the appointment time and preferred service language — English or Spanish — including a virtual option.

6

APPOINTMENT IS SET

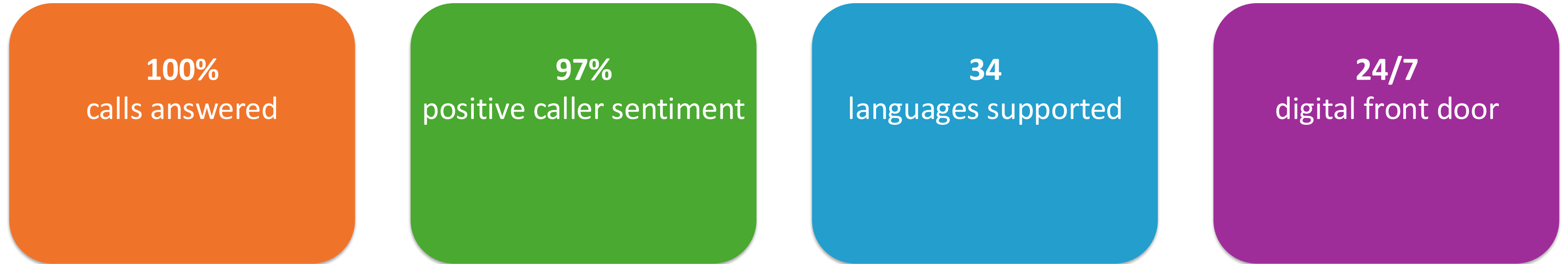
The client completes the scheduling process directly — reducing staff phone time and back-and-forth.

SAFETY ESCALATION

If a caller states they may harm themselves or someone else, the call transfers to 988.

Compassion Voice: what changed

The source deck highlights a service model designed to answer, understand, schedule and escalate.



Also in the model: intelligent appointment scheduling, staff oversight, crisis intervention and warm transfers.

Then we asked a bigger question

What if the intelligence at the front door connected to the entire client journey?

Universal Intake

Household
Management

Program Enrollment

Case Management

Referrals

Documents

Dashboards

Client Portal

Compassion Voice (AI)

CompassionCore 360: one connected operating system designed around nonprofit service delivery.

Why an integrated system matters

CompassionCore 360 connects client, household, program, case-management and reporting workflows instead of leaving them in separate silos.

BEFORE: fragmented

- Multiple intake forms
- Duplicate client records
- Manual referrals
- Staff re-keying information
- Reporting assembled after the fact

AFTER: connected

- Shared client + household records
- Cross-program participation
- Enrollment and service tracking
- Documents and follow-up
- Dashboards + outcome reporting

The win is not “more technology.” The win is fewer handoffs, less duplication, and better visibility into impact.

Put AI to work on the documents nonprofits already create

Start with work that consumes leadership and staff time — while keeping judgment, ownership and final approval human.

CASE FOR SUPPORT

Organize evidence, sharpen the narrative, identify gaps, tailor versions for audiences.

BYLAW REVIEW

Compare sections, flag inconsistencies, summarize proposed changes, create board discussion questions.

PROGRAM NARRATIVES

Turn program models, outcomes and data into consistent grant, board and community narratives.

SOPs & POLICIES

Convert tribal knowledge into first drafts, checklists, training guides and process maps.

BOARD MATERIALS

Summarize reports, draft executive briefs, organize decisions and action items.

GRANTS & REPORTING

Create first drafts, align language to requirements, summarize outcomes and identify missing information.

Use AI to get from a blank page to a strong first draft — not from a blank page to an unreviewed final answer.

Three questions to take back to your organization

Use these to start the conversation with your team next week.

1

Where are we spending human time on repetitive work?

2

Where do clients experience delay, confusion, or repeated intake?

3

What would we do with 5–10% more staff capacity?

Q&A • What problem would you solve first?

What becomes possible next?

The future of nonprofit AI is not fewer people. It is better leverage of people, knowledge, data and relationships.

BETTER COLLABORATION

- Shared organizational knowledge
- Faster handoffs
- Less information trapped in departments
- Better coordination with partners

MORE PEOPLE SERVED

- 24/7 access
- Multilingual engagement
- Faster intake and routing
- Staff capacity focused on human needs

BETTER OUTCOMES

- Earlier identification of needs
- More consistent follow-up
- Real-time learning from data
- Resources directed where they matter most

Imagine a nonprofit where information follows the client — not the other way around.

AI should help us serve more people effectively and efficiently while protecting dignity, trust and human connection.

Continue the conversation

Schedule a no-cost session with Matthew Kill at HyperBolt to explore where AI could create the most value in your organization



Bring one real nonprofit challenge.

- A workflow that takes too much staff time
- A client-access or intake challenge
- A reporting, case-management or collaboration problem
- A question about responsible AI adoption

**Scan the QR code → HyperBolt / CompassionCore 360
No-cost introductory session**

Utilizing AI Today to Improve Operation Efficiency



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thank you!

Share your feedback

