

NATION
SWELL

Getting started with Gen AI

*A practical guide for
social impact professionals*

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About this resource

AI is rapidly becoming part of how work gets done. It is helping people write faster, summarize information, find patterns, and collaborate more efficiently.

This guide is designed for purpose-driven professionals who want to get smarter about applying generative AI (gen AI) without getting overwhelmed. It is intended to help you use AI to **boost your capacity, improve your communication, and free up time.**

Who this guide is for

- **Corporate impact teams** keeping pace with internal AI rollouts
- **Nonprofit staff** under pressure to do more with less
- **Philanthropy leaders** with digital fluency seeking practical use cases

Note: There are risks and unintended consequences of using AI, especially for the social impact sector. While we encourage you to research and assess these risks in the lens of your own organization, this guide is not intended to address their impact on the sector and workforce.

Reader outcomes

By the end of this resource, you should be able to:

- Identify **workflows** you can improve with gen AI
- Feel more confident **testing gen AI tools** in your workplace
- Start building team-wide **awareness and capacity** around responsible AI
- Develop prompts you can use for **strategy and operations, measurement and reporting, and content and storytelling** tasks like:
 - Formulating recommendations from multiple inputs
 - Synthesizing insights for decision-makers
 - Drafting RFPs or program guidelines
 - Summarizing grantee or partner reports
 - Drafting performance summaries from dashboards
 - Tailoring messages for specific audiences

What you need to know about AI *today*

KEY TERMS

LLMs (Large Language Models): AI systems trained to generate human-like text based on prompts.

Generative AI (GenAI): AI that can produce new content: text, images, code, audio, and other forms of content.

AI agents: Tools that can perform multi-step tasks with minimal human input.

Prompt engineering: The practice of crafting clear, specific inputs to get better outputs from AI.

Current state of AI

AI is no longer a specialized tool limited to a few experts. It is embedded in everyday platforms like **email, documents, and internal systems**. In many cases, you don't even need a new login or tool; the **systems you already use may include AI features**.

*Common
platforms with
integrated AI*

Microsoft 365 (Co-Pilot)
Google Workspace (Gemini)
Notion
Slack
Zoom
Canva

Emerging state of AI

Among other advances in AI, several practical developments and upgrades are on the near horizon:

- **Function-specific copilots** (e.g., legal, HR, finance)
- **Specialized summarization and recommendation tools** (e.g., American Pride Rises, a NationSwell partner, recently launched **Ediva**, an AI tool "designed to empower individuals and institutions with accessible, reliable and values-driven information about DEI through the lens of American laws and policies.")
- **Autonomous agents** that manage multi-step processes

Why practical AI matters for *social impact work*

Time & clarity

For social impact leaders, time and clarity are precious. Gen AI can offer both. It can **reduce time spent** on manual or repetitive work and help **synthesize complex information** into useful outputs. But effectiveness depends on your ability to direct tools clearly and to vet AI-produced content before using or sharing it.

Extends capacity

Start with a realistic view of what AI can and can't do. It's a tool that extends your capacity but **cannot substitute for judgment, relationships, or critical thinking**. AI performs well on tasks like **pattern recognition, summarization, and drafting**. It struggles with nuance, context, emotional intelligence, and complex stakeholder dynamics.



Gen AI can help, *and* it needs human oversight.

We should think of AI as a large team of interns that can help us accelerate our work, but won't do the work for us. We still have to be actively engaged managers and leaders to really make AI's outputs impactful for our work."

- Social impact leader

Practical applications for *social impact professionals*

Explore the following task and prompt examples of how AI – particularly gen AI – can support common social impact tasks.

In 2025, **72% of corporate social impact teams** use AI for **storytelling and communications** (think: drafting reports, social content, or messaging), while **37%** are using the technology for **data analysis and aggregation**, a 23% increase from 2024.

These examples are not exhaustive. Rather, they're meant to provide an introduction to a much wider range of use cases for this technology which is becoming an **essential part of how teams improve performance, enhance storytelling, and scale their impact.**

Strategy & operations

Measurement & reporting

Content & storytelling

Strategy & *operations*

Task: Formulate recommendations from multiple inputs

Use AI to

Develop guidance, suggestions, and next steps based on rough notes from brainstorming, stakeholder interviews, and other inputs

Prompt examples

“Distill the key themes and takeaways from these team brainstorming notes.”

“Draft three potential directions for our strategy based on the provided stakeholder interview notes.”

Watch for

Dull or overly generic recommendations

Trust level



Moderate

Review and edit before sharing



I used AI to develop an initial draft of a ‘toolkit’ for how to onboard a new contractor who would be taking over the role of someone that was going to be on extended leave.

– Vice President of a private foundation

Strategy & *operations*

Task: Synthesize insights for decision-makers

Use AI to

Summarize long documents, pull key takeaways, and generate first drafts of memos or slides

Prompt examples

"Summarize the key takeaways from this report for an executive audience in 5 bullet points."

"Draft talking points for a conversation with my CHRO that summarizes the findings from this report."

Watch for

Over-simplification or missing nuance

Trust level



Moderate

Review and edit before sharing



We use AI to generate board and executive/leadership briefs. This [task] used to take significant amounts of time, but now we are able to produce briefs in 50% of the time. We also see it as a huge plus, as it allows us to tailor our briefs as we add new board/leadership members and the board/leadership composition changes.

– Partnerships Manager for a corporate foundation at a technology company

Strategy & *operations*

Task: Draft RFPs or program guidelines

Use AI to

Create draft templates based on examples or criteria you provide

Prompt examples

"Create a preliminary outline of an RFP for a \$50K grant to support youth mental health initiatives."

"Develop three to five high level concepts for a workforce upskilling grant program based on these parameters."

Watch for

Generic or risky language

Trust level



Moderate

Review with legal or program teams



We use AI to suggest project tasks, timelines, which stakeholders should be involved, create risk and mitigation plans, and more. This used to be very manual, but can now be generated quickly.

– Partnerships Manager for a corporate foundation at a technology company

Strategy & *operations*

Task: Create prep materials, agendas, or follow-up docs for collaboration

Use AI to

Draft meeting agendas, generate recaps, or identify action items from notes or transcripts

Prompt examples

"Draft a follow-up email with next steps from this meeting transcript."

"Create a meeting agenda that accomplishes the following goals."

Watch for

Skipping context or misinterpreting tone

Trust level



Moderate

Light edit and accuracy review



We use AI for meeting note summaries. This is especially true when team members are out of office or unable to join meetings. As a globally distributed team, we find this extremely helpful in staying aligned and allowing team members to continue to contribute meaningfully. We also see a reduction in ramp-up speed when out of office.

– Partnerships Manager for a corporate foundation at a technology company

Measurement & *reporting*

Task: Summarize grantee or partner reports

Use AI to

Extract highlights, distill key information, and form recommendations from lengthy reports

Prompt examples

"What key metrics were reported in this partner report?"

"What opportunities for additional support or investment emerge from this report?"

Watch for

Misinterpreting data due to missing context

Trust level



Low

Review and verify against source



I want to use [AI] more for data and analytics...finding the best way to position our corporate foundation, and finding best practices to engage employees.

– Senior Program Manager for a corporate foundation at a technology company

Measurement & *reporting*

Task: Draft performance summaries from dashboards

Use AI to

Turn raw data into narrative summaries

Prompt examples

"Write a short summary of our Q2 KPIs for a board update."

"Write a summary describing the change over time between Q1 and Q4 outputs."

Watch for

Fabricated insights or trends

Trust level



Low

Review and verify against source



By integrating AI into my workflow – drawing from over 50 chats worth of context – I have reduced planning time for key deliverables by up to 80%. Executive online dashboards that once took 3–4 days to build are now drafted in under 2 hours.

– Project Manager for a corporate foundation at a financial company

Content & storytelling

Task: Draft blogs, social media posts, or newsletter content

Use AI to

Create or edit drafts in various voices (e.g. your brand voice, your CEO voice, your personal voice)

Prompt examples

"Draft a 150-word newsletter article about this new community partnership."

"Draft a blog post spotlighting the results of this recent report."

Watch for

Bland or generic writing

Trust level



Moderate

Edit for voice and tone



I use AI to initiate drafts of email communications for All Staff to make important announcements.

– Vice President of a private foundation

Content & storytelling

Task: Tailor messages for specific audiences

Use AI to

Customize copy for employees, partners, customers, and other key audiences

Prompt examples

"Convert this memo into an email to our employees."

"Draft an email update to our donors summarizing the key messages in our impact report."

Watch for

Tone drift or distorted intent

Trust level



Moderate

Review with stakeholder before sending



I used AI to develop an assessment guide to refine a program I was leading (i.e., an evening community conversation over dinner that I was moderating for the board and additional guests).

– Vice President of a private foundation

I've used AI for ideation; for example, I have prompted it with: 'We're having a panel, what kind of questions can we ask? We have a specific description, can you improve it? Can you make it sound like this? Can you make sure that we're meeting all of these different points?'

– Senior Program Manager for a corporate foundation at a technology company

Getting started

Steps to adopt AI in your day-to-day work

1. **Start with one workflow** where you often get stuck—drafting, summarizing, rewriting—and pilot a single AI use case there.
2. **Check what your current tools can already do.** AI is increasingly built into systems you already use.
3. **Create a shared space to track prompt variations and insights**—a document, a Slack thread, a whiteboard. Host short "show and tell" sessions with your team to surface what's working and what's not.
4. **Track outcomes.** Note how AI is improving your workflow and share these examples with others. Make it a habit to pause and ask: "Could AI help with this?"
5. **Designate an AI lead.** This isn't a technical role—just someone to gather examples, document learnings, and serve as a go-to resource during experimentation.

Supporting team adoption

To encourage healthy experimentation, shared learning, and adoption by your team, leaders can:

- Set shared expectations on when and how to use AI
- Encourage opt-in experimentation before rolling out across the team
- Host regular check-ins to discuss learnings, friction points, and opportunities
- Document approved prompts or tasks and maintain a shared list
- Align AI usage with team values around transparency, learning, and impact

Using AI *responsibly*

Develop internal guardrails, especially if your organization handles **sensitive data**, **public communications**, or **complex partnerships**:

- Ensure a human conducts a close read, checking for grammar and revising tone
- Limit use of identifiable data; de-identify data before uploading
- Mandate source citation when sharing secondary research; include disclaimers
- Establish boundaries in workstreams to create transparency and shared expectations
- Document when and how AI is used in decision-making processes

When to avoid AI

Use AI to support your workflow, but always keep a human in the loop. Generally avoid using AI for:

- ❌ Legal, medical, or financial advice
- ❌ Equity audits or DEI decisions
- ❌ Sensitive HR or interpersonal issues

Common risks

Hallucinations: AI may invent facts

Tone drift: Outputs may sound robotic or off-brand

Compliance issues: AI may introduce risky or conflicting language

QC checklist

Use this checklist before sharing AI-generated content:

- ✅ Am I confident in the accuracy?
- ✅ Can I identify and defend the sourcing of the data or information included?
- ✅ Have I taken ownership of the quality and value of the work, rather than passing that responsibility to others?

Iterating *prompts*

AI may provide an output that includes **too much information, too little information, or not quite what you need**. This could be the result of many factors including gaps in the model, lack of clarity in the prompt, and/or inaccuracies in the data provided.

In these instances, it's best to **reframe your prompt** and inherently, train the model. See the following approaches to prompt iteration and the task example below:

1. Revise the prompt by clarifying your request, or
2. Narrow in on a specific request or topic, or
3. Broaden the scope of your request to get more of an overview.

TASK Create an action plan to address areas of improvement identified in a quarterly planning meeting

INITIAL PROMPT *"Identify the areas of improvement mentioned in this transcript of our quarterly planning call."*

OUTPUT Lists key areas of improvement in no particular segmentation

SECONDARY PROMPT *"Organize the areas of improvement by what is most achievable in the short-, mid-, and long-term."*

Add your AI tasks

Let's hear from *you*.

Would you like your team's AI tasks to be represented in this resource?

Email us at insights@nationswell.com with the following:

- Your name and affiliation
- Tasks that you use AI to assist with
- Brief description of prompts you've found successful

How AI helped produce *this resource*

To practice what we teach, NationSwell partnered with **generative AI** to develop this resource. Specifically, we used **ChatGPT** to:

- Summarize source materials and notes
- Draft and revise early versions of the guide
- Generate example prompts
- Edit for clarity and conciseness

NationSwell staff **reviewed, edited, and approved** all content. We determined what to keep, what to change, and how to ensure accuracy and tone.

Thank *you*

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