

February 9, 2024



Orr Group LEARNS

AI Tools

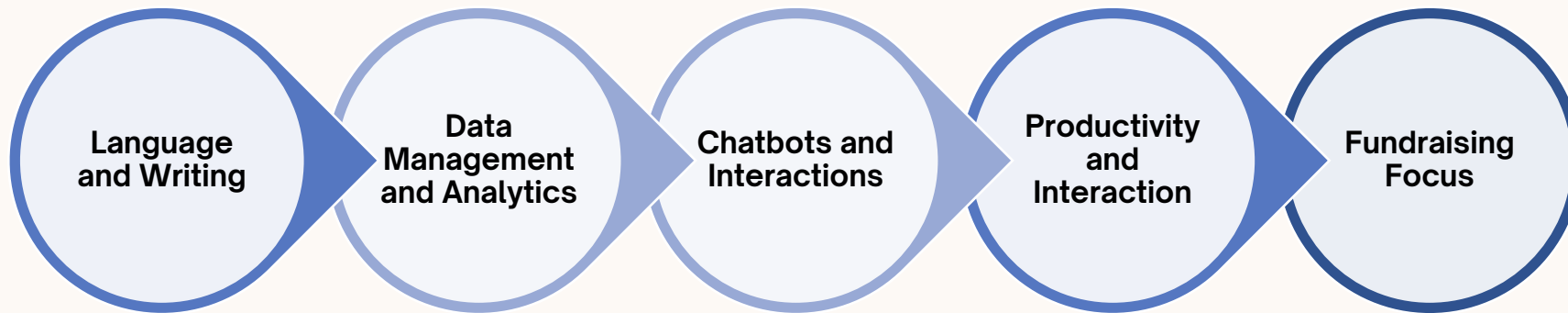
Research Analysis

The information contained is sourced from publicly available data. The perspectives and insights shared reflect the views of Orr Group and are not to be construed as definitive or authoritative.



Executive Summary | Methodology

To further our work and impact with nonprofit clients, Orr Group established an **AI Task Force** to evaluate and test AI tools across multiple categories including:



To date, **90+ AI tools** have been reviewed and assessed. The following materials provide a comprehensive summary of these AI tools, evaluated for nonprofit organizational needs based on **functionality, pricing, and suitability**.

Executive Summary | AI Taskforce

In July 2023, Orr Group formed a team of eight staff members from various business functions to enhance our firm's AI implementation knowledge and develop resources aiding the nonprofit sector's AI expansion.

Core Objectives of the AI Taskforce:

- 1. AI in our Workflows:** Embed AI tools into regular work processes and administrative activities to reduce staff workload with improved efficiency and quality.
- 2. AI in our Work Product:** Apply AI tools to enhance our embedded client partnerships and increase the caliber of our services and deliverables.
- 3. AI in the Field:** Position Orr Group as an AI thought leader in the nonprofit sector to advance fundraising. Accelerate non-profit AI adoption timelines by improving non-profits' staff skills and helping them access the tools best suited to their work.

Achievements to Date:

- Developed Orr Group's first AI Tool Usage Policy outlining responsible usage and data privacy/security.
- Assessment of 90+ tools to understand the AI landscape and functionality of AI tools applicable to Orr Group.
- Led several staff trainings and developed resources in Fall 2023 to engage employees and refine core skills.
- Produced [thought-leadership articles](#) to educate the nonprofit sector on the impacts and considerations of AI.

Executive Summary | Key Insights

Nonprofits can find the best results from AI tools in the following use cases:

Initiating Work Products

- Start by drafting foundational documents to serve as a base for further refinement
- Aggregate expertise quickly into initial template
- Create a framework to build on for final work products
- Avoid writers block and initiate a project

Creating Capacity

- Maximize output with minimal staff by generating diverse versions of a project
- Streamline operational procedures to enhance productivity
- Leverage data analytics to optimize workflows and strategic decision-making
- Automate repetitive tasks

Decreasing Costs

- Design tools and other AI products replace typically outsourced functions (graphic designers, etc.)
- Data analysis to identify ROI and areas for improvement
- AI personalizes donor communications, boosting engagement and reducing acquisition costs

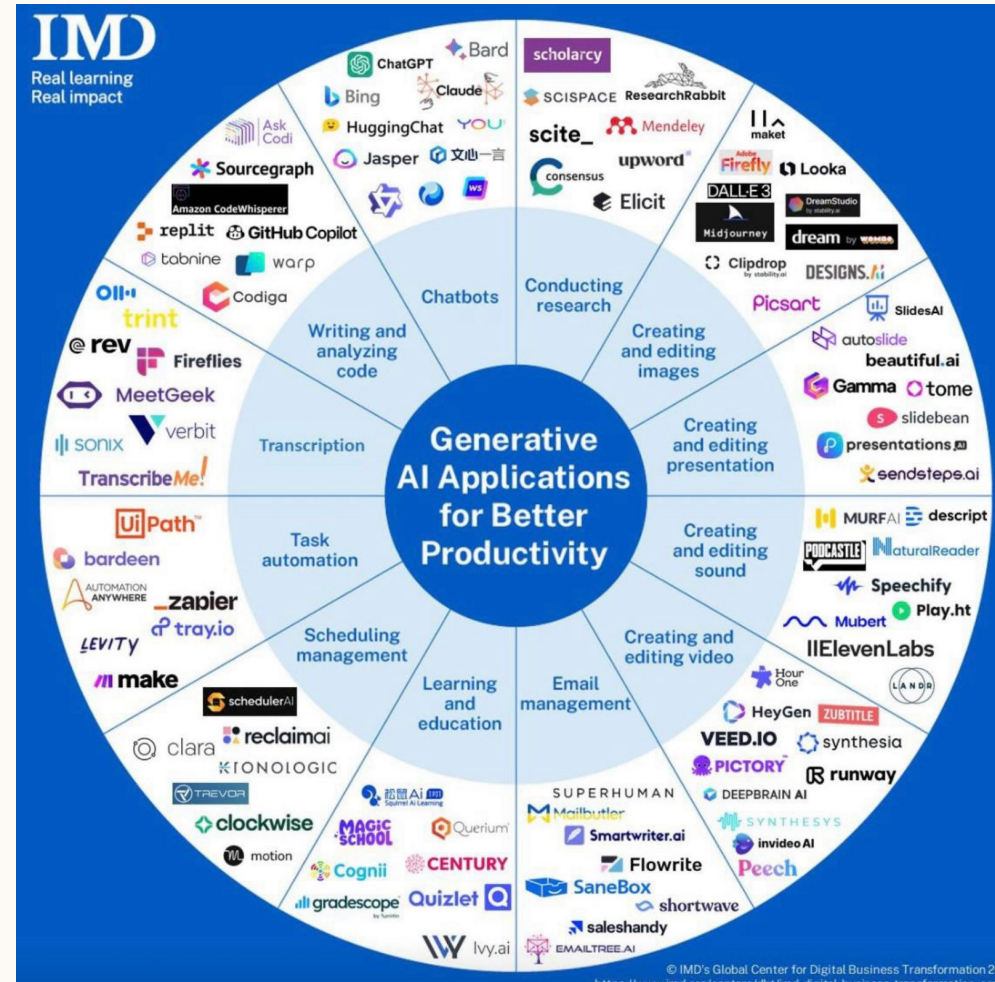
Executive Summary | Trends

Nonprofits are typically slower to adopt new technologies, and often don't have the same organizational resources to train staff on utilization. Based off this research, below are trends for nonprofits to be aware of as they are considering utilizing AI tools.



Risk	Data	Productivity
<p>Staff may be starting to utilize AI tools personally and may not be aware of data sensitivity or other risk factors such as false citations. Organizations should develop and share usage policies and provide training to staff to help minimize organizational risk.</p>	<p>Nonprofit organizations with large data sets are incorporating trends from the for-profit sector in utilizing AI for large data sets. This should continue to be evaluated for how these tools can be effectively utilized in the nonprofit sector with potentially different data regulations.</p>	<p>There's a noticeable trend towards tools that enhance productivity. These can be great resources for organizations, but will require updated training and procedures for staff, especially front-line fundraisers.</p>

Executive Summary | Evolving AI Landscape



Assessment of AI Tools

Comprehensive evaluation of the top solutions found out of the 90+ tools evaluated by the AI Taskforce

AI Tools | Orr Group's Top AI Solutions



ChatGPT

Use: Advanced conversational AI tool with customization options and plug-ins

Cost: Free - \$20/month (newest version, more plug-ins)

Review: The best AI tool for power users and for integrating with other apps. Great for research, content creation, data analysis, and administrative tasks



Copilot

Use: Conversational AI tool with image generation and live web sources

Cost: Free (paid version not available yet)

Review: The best AI tool for average Microsoft users – better platform than ChatGPT's free offering, but less customization than ChatGPT Plus.



(Formerly Bard)

Use: Conversational AI tool with live web sources and Google extensions

Cost: Free

Review: The best AI tool for average Google account users – better platform than ChatGPT's free offering, but less customization than ChatGPT Plus.



Use: Create podcasts seamlessly from articles, text generation

Cost: Free - \$99/month (5 hours of podcasts)

Review: Easy to use and decreases time substantially from creating a script, recording, and background music, ethical questions on disclosing



Cody

Use: Basic conversational AI tool on Intranet page to support basic HR queries

Cost: Free - \$99/month (newest version, customizable options)

Review: Easy to create and share, this custom chatbot can be trained on a combination of documents and specified websites



Zapier

Use: Automate processes between applications and research

Cost: Free - \$69/month (unlimited users, tech support)

Review: Requires some technical knowledge, but a high degree of automation and integration to a large variety of apps



Grantable

Use: Streamlines grant reporting and responses to RFP questions

Cost: Free - \$199/month (multiple users, unlimited text)

Review: Free version credits are utilized quickly, easy to use and accurate






Zoom AI Companion

Use: Compile notes, action items, and recall information during Zoom meetings

Cost: Only available with plans \$14.99/month and up


Review: High value tool that saves manual time note taking

AI Tools | AI LLM Assistants

AI Tool	Description	Pricing	Notes
Chat GPT 4 (Plus) 	Advanced conversational AI model by OpenAI	Free - \$20/month (enhanced features, newest version, tools, upload files, etc.)	Most innovative tool with new features and plug-ins continued to be unveiled.
Claude	AI Assistant focused on ethical AI implementation, and data privacy	Free - \$20/month (newest version)	Alternative to ChatGPT with focus on data privacy and ethical AI standards, but less functional
Coda.IO	AI Assistant to create documents and sort information faster, using organizational data	Free - \$30/month (unlimited automations, team features)	Cost-effective option for organizations looking to use a common AI tool for staff to build materials.
Google Gemini (formerly Bard) 	Google's experimental, conversational, AI chat service; added Gemini for more advanced coding and processing December 2023	Free (No paid version)	Most useful for prospect research and strong creativity; ability to export to Google sheet and use data within personal Google Drive.
Microsoft Copilot 	Conversation model to process information and fulfill requests	Free (with Microsoft O365 license)	Strong responses on topics that require real-time knowledge
Perplexity AI	AI Assistant focused on improving search engine functionality	Free (No paid version)	Displays AI responses in a Google search-like interface for quick fact-finding and news
Leena	Chatbot specializing in completing tasks in business operations (IT, HR, Finance, Sales, etc.) and fielding employee questions	Custom pricing options	AI features combined with a chatbot to help field employee questions and multiple business functions





AI Tools | Custom AI Chatbots

AI Tool	Description	Pricing	Notes
Cody.AI 	Chatbot that uses organizational content to answer queries for employees based on defined knowledge sources	\$29 (3 users, 3 bots) - \$249/month (50 users and 50 bots)	Easy to deploy with some customization; cost-effective at small scale
Cohere	Chatbot with specialization in business and professional services	Custom pricing options	Interface used to build McKinsey internal chatbot, more expensive and specialized; higher skill level needed for deployment
Amazon Lex	Voice and text chatbot creator	\$32 for 8,000 requests	Built on Amazon platform and emphasizes “voice” chatbot functionality
Dialogflow	Google's chatbot development framework	Cost varies per usage	Build chatbots and voicebots interfaces on Google’s platform – more expensive and specialized.
ChatGPT	Ability to create Chatbot using Open AI interface	\$20/month (need subscription to use)	Easy to create custom chatbots, but not easy to secure who has access or deploy outside of the ChatGPT interface
LLaMa 2	Chatbot creation and deployment tool	Free, built on Meta	Programming/technical skill required, free to build chatbot




AI Tools | Writing and Content Creation

AI Tool	Description	Pricing	Notes
Grammarly Go 	Advanced grammar and spell checker	Free - \$25/month for all features	Highly effective tool for grammar checking and auto completion of writing, with simple AI text generator built-in
Wondercraft 	Create podcasts seamlessly from articles, text generation	Free - \$99/month (5 hours of audio)	Very user friendly and wide range of podcast creation features
Descript	Creates trainings, and other content (podcasts, images, design, etc.)	Free - \$24/month (30 hours of audio)	Ability to create trainings easily and quickly; podcast and design features
Synthesia	AI generated video (AI actors)	\$22 - \$67/month (360 minutes of video)	Very cost effective compared to hiring actors and production (alternative is Hour One)
PlayHT	AI Voice generation and voice cloning	Free - \$99/month (unlimited)	Voice cloning is fairly accurate with limited inputs
ElevenLabs	AI Voice generation, audio editing, subtitles, and voice cloning	Free - \$22/month	Several voice and audio editing features in one place





AI Tools | Human Resources

General AI Tools	Description/Functionality	Pricing	Notes
Juicebox.AI (People GPT) 	Recruiting tool to source candidates via LinkedIn profiles with email information	Free (100 searches)- \$179/month (unlimited, export ability, more profiles)	Highly intuitive and accurate to find candidates with certain specifications
CultureAmp	Employee engagement and culture analytics	\$4,000 (engagement survey) - \$13,000 (+performance) / year	Optimal for large firms; deciphers company culture and highlights issues. Expert-vetted, yet costly. Machine learning and automation of manual processes
Attract.AI	Manage talent pipeline and source candidates via all social profiles	Custom pricing options	Integrates directly with HR software, most expensive
Textio	Augmented writing platform to analyze inclusive language	\$20,000+ (Full platform)	Useful to help analyze text for inclusive language, but very expensive.





AI Tools | Graphic Design and Presentations

AI Tool	Description/Functionality	Pricing	Notes
MidJourney 	AI-generated art platform	\$10/month (13 jobs) - \$120/month (faster, 25+ jobs)	Used regularly and easy to generate graphic content, not as user friendly
Stability.AI	AI image generation	\$20/month	User friendly and better for more creative/artistic images
DALL-E (ChatGPT Plug-In) 	AI image generation	\$20/month (only available with premium ChatGPT)	Less variability in design choices but easily accessible in ChatGPT interface
Tableau	Data visualization and analytics	\$15 - \$70/user/month	Easy to set up and use, however, requires strong maintenance of data to be useful
Gamma.App	AI created decks and presentations; AI writing element	Free - \$15/month (unlimited creation)	More creative and stronger AI generative capabilities
Beautiful.AI	AI created decks and presentations	\$12 - \$40/month (branding uploaded)	More boiler plater and less creative than Gamma.App





AI Tools | Administrative Functions

AI Tool	Description/Functionality	Pricing	Notes
Zoom AI Companion 	Note taking for Zoom meetings, ability to ask AI companion for real-time information	\$14.99/month and up	Accurate notes, seamless integration into Zoom meetings
Zapier 	Automate repetitive administrative tasks and connect across multiple platforms and data sources	Free - \$70/month	Requires some technical knowledge but a high degree of automation and integration to a large variety of apps
Otter.AI	Audio transcription and note taking	Free (300 mins) - \$20/month (analytics, 3 assistants)	Easy to use and integrates to Zoom, less accurate with notes
fireflies.ai	Audio recording and transcription platform for note taking	Free (800 mins) - \$19/month	More reasonable and easier to set up, lower quality but a free option with generous credits
MeetGeek.AI	Virtual meeting platform	Free (300 mins) - \$59/month	Very good tool but unsure on difference from Otter.AI and fireflies
Clara	AI-powered scheduling assistant	\$300/month/user (unlimited)	High-quality product; however, it's costly, may exhibit latency, and poses challenges for large organization implementation





AI Tools | Data Insight and Management

AI Tool	Description/Functionality	Pricing	Notes
PowerBI (and Power Automate)	Microsoft analytics/automation tools that provide visualizations and business intelligence capabilities.	\$10/user/month and up	Simple interface with numerous integrations. Easily connected with Office 365 security groups
Apollo 	Sales engagement and lead management; sources contact information based on limited data	Free (60 credits/year) - \$99/month (1,200 credits)	Finds contact information for prospects and sales, AI assistance with cold emails
Hunter.IO	Source contact information and integrates into email, automated cold email campaign	Free - \$349/month	Easy to use and accurate, more expensive, AI assistance with cold emails
Salesforce - Einstein 	AI-powered CRM analytics, financial projections and other analysis	\$50/user/month	Powerful AI analytics into projections based on CRM data, however, technical skills required to set up
Booke.AI	Financial bookkeeping automation tool	\$60 - \$120 annually (higher integration/features)	Only integrates with QuickBooks and Zero
Amazon Rekognition	Image and video analysis tool	\$1,000 for 1M images	AI detects faces, text, and more from large image/video datasets



AI Tools | Nonprofit and Fundraising Focus

AI Tool	Description/Functionality	Pricing	Notes
Raise from Gravyty 	AI moves management and email generator for frontline fundraisers	Starting at \$30,000+	Tool that requires minimal training (emails automatically) most suitable for large team
Impact Writer (by Life Legacy)	AI Language Model for fundraising to generate content (blogs, appeals, etc.)	Free (2 features) - \$40 / month (full suite of features 10+)	Largest suite of AI fundraising tools all in one place to create content, centralized and comprehensive, uses ChatGPT
Life Legacy	Planned giving marketing and management	Starting at \$199/month (3 features)	Strong tool and most comprehensive in the planned giving portfolio of options, AI limited to content writing
FundMiner	Connects Fundraising CRM, grant management, finance, and impact reporting systems	\$5,000 (initial) and \$12,000+ annually (# of restricted funds)	Very strong product on review, uncomplicates and solves many compliance and restricted funds tracking now in silos
Grantable 	Grant writing system based on organization materials, past applications, and other resources uploaded	Free - \$199/month (10 users)	Easy to use and very compelling work products, free version credits are used up quickly
b.world	AI-powered impact measurement and storytelling app for corporate and social impact teams.	\$90 (2 users) - \$900/month (25 users)	AI assists with content generation, emphasizing stakeholder engagement and materials
Fundwriter.ai	Leverage organization's data, content to create targeted proposals, appeals	\$22 (20K words) - \$68/month (unlimited)	User friendly tool overall but lacks differentiation from other tools on the market (Impact Writer, etc.)
Hatch	Provides AI-powered prospect information on individuals	\$50 (2,500 prospects) - \$250/month (20K prospects)	AI assists with parsing prospect information and research from various data sources
Humanitas AI	In-kind fundraising management and AI chatbot for nonprofit organization	Free	Must be a non-profit to use, can be customized to your organization's data, and collaborative space.



Conclusion | AI Transformative Potential

Orr Group's AI Task Force has assessed **90+ AI tools** in the key areas of fundraising, productivity, and data management.

- **Benefits for Nonprofits:**
 - Draft foundational documents efficiently
 - Streamline workflows
 - Reduce costs through automation
- **Challenges for Nonprofits:**
 - Slow adoption of AI innovations
 - Limited resources and training

Call to Action: The changes AI will bring to the nonprofit sector demands a proactive approach to AI and nonprofits must invest and adapt. AI is not just a trend; it's the future.

About Orr Group

SIZE

70+ employees in the US, with offices in Washington, DC and New York City.

CORE SERVICES

Strategy
Fundraising
Campaigns

Talent
Planned Giving
Leadership

FOUNDED

1991

EXPERIENCE

Work with 70+ nonprofits per year, globally and nationally across the social sector.

Use a team-based approach to design, manage, and lead comprehensive fundraising efforts ranging from \$10M - \$1B+.

Specialize in building and implementing creative and data-driven approaches to philanthropy.

REPRESENTATIVE CLIENTS



Connect With Us



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- Expertise in fundraising and development, executive leadership, strategic planning, campaigns, and events management.
- 10+ years experience as an expert project and relationship manager.
- Background in finance and strong foundation in data analytics, metrics, and ROI.



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- 10+ years experience in organizational operations and technology.
- Specializes in efficiencies, building operational strategies and innovations.
- Expertise in workflow improvements in nonprofit organizations.

Appendix

Disqualified AI Tools

AI Tool	Description	Pricing	Reason for Review
<u>Change Finder</u>	ChatGPT for grant writing	Free (1 user, less custom) - \$80/month (more tools)	Unsure difference from ChatGPT platform/overall benefits
<u>MonkeyLearn</u>	Text analysis and machine learning platform	Free (100 text analysis) - \$99/month (unlimited, NPS, etc.)	Challenging to use and not much better analysis of bulk text other than ChatGPT
<u>Fundraising Kit</u>	Various tools open sources to support development strategy	Customized	Software was not an AI tool and only calculated simple fundraising metrics via Google Sheets
<u>AutoGPT</u>	Autonomous version of GPT-4, requires Python 3.8 or later, an OpenAI API key, and a PINECONE API key to function	Unable to source	Too complicated and expensive for internal use