Grant Proposal Budget Demo Scenarios

Additional Use Cases for Financial Intelligence Co-Pilot

Overview

The grant proposal budgets file adds sophisticated financial planning capabilities to your demo, showing how AI can help with complex multi-year, multi-funder scenarios that movement organizations face daily.

Key Capabilities Demonstrated

1. Strategic Funding Analysis

The AI can now analyze funding strategies across multiple proposals:

- Total funding pipeline assessment
- Diversification analysis
- Risk evaluation
- Restriction implications

2. Multi-Dimensional Budget Planning

Shows how AI handles complex budget structures:

- Multi-year projections
- Multiple funding sources
- Various restriction types
- Different indirect rates

3. Scenario Modeling

Demonstrates real-world "what-if" planning:

- Partial funding scenarios
- Staffing implications
- Program sustainability
- Cash flow projections

Demo Scenarios to Explore

Scenario 1: Executive Director Planning Session

Context: ED needs to understand overall funding strategy

Try this sequence:

1. "What's our total funding pipeline for the next 3 years?"
2. "Which grants are restricted vs. unrestricted?"
3. "If we only get 60% of what we're requesting, which programs are at risk?"
4. "How many new positions depend on pending grants?"

What this demonstrates: Strategic thinking support, not just number crunching

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Scenario 2: Program Director Budget Planning

Context: Youth Program Director planning expansion

Try this sequence:

1. "How much funding are we seeking for youth programs?"
2. "Break down the Youth Leadership Institute budget by category"
3. "What's the cost per youth participant in the proposed budget?"
4. "How does this compare to our current youth program costs?"

What this demonstrates: Program-specific analysis in accessible language

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Scenario 3: Development Team Strategy

Context: Development Director preparing for board meeting

Try this sequence:

1. "Create a funding diversification analysis of our grant proposals"
2. "Which funders have we approached for multi-year support?"
3. "What's our average indirect cost rate across all proposals?"
4. "Show me the sustainability plan if Emergency Response isn't renewed"

What this demonstrates: Sophisticated development analysis and reporting

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Scenario 4: Finance Committee Review

Context: Board Finance Committee evaluating organizational growth

Try this sequence:

1. "What's the total personnel cost across all grant proposals?"
2. "How would these grants affect our personnel-to-program ratio?"
3. "Which grants have the highest ROI for mission impact?"

4. "Model our cash flow if grants are awarded on different schedules"

What this demonstrates: Board-level financial analysis and governance support

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Advanced Queries to Test

Cross-Grant Analysis

- "Compare indirect rates across all five grant proposals"
- "Which grants allow the most flexibility in spending?"
- "Total all technology investments across proposals"
- "How much are we requesting for evaluation across all grants?"

Staffing Implications

- "List all new positions in the grant proposals with salaries"
- "What's the total benefits cost across all proposals?"
- "Which positions are funded for full 3-year terms?"
- "Calculate the per-FTE cost including benefits"

Risk Assessment

- "Which programs would be most affected if Ford Foundation isn't renewed?"
- "What's our funding concentration risk by funder?"
- "Which grants have the most restrictive terms?"
- "How much unrestricted funding are we projecting?"

Budget Narrative Support

- "Explain why we need a full-time Program Director for Housing Justice"
- "Justify the 28% benefits rate to a funder"
- "Why are indirect costs different across grants?"
- "Describe the evaluation plan costs"

What This Demonstrates to Clients

1. Complex Data Handling

- AI can work with multi-dimensional budget data
- Understands relationships between different funding sources
- Maintains context across multiple proposals

2. **Strategic Thinking Support**

- Not just calculations but implications
- Helps see patterns and risks
- Supports decision-making at all levels

3. **Accessibility**

- Finance committee gets detailed analysis
- Program staff get relevant program budgets
- ED gets strategic overview
- All from the same data

4. **Real-World Relevance**

- These are actual challenges organizations face
- Shows AI understanding of nonprofit funding reality
- Demonstrates value beyond simple Q&A

Tips for Demo Success

Start Simple, Build Complexity

1. Begin with single grant questions
2. Move to comparative analysis
3. End with complex scenarios

Show Different Perspectives

- Ask same data from different role perspectives
- Demonstrate how AI adapts its communication
- Show value for various stakeholders

Highlight Time Savings

- Note how quickly complex analyses are generated
- Compare to traditional spreadsheet manipulation
- Emphasize accuracy and consistency

Connect to Mission

- Always bring financial analysis back to impact
- Show how better financial planning = more mission delivery
- Demonstrate values-aligned budgeting

Expected Outcomes

After exploring grant proposal scenarios, users should understand:

- ✅ AI can handle complex, multi-source financial planning
- ✅ Analysis is accessible to non-financial staff
- ✅ Scenario planning becomes quick and iterative
- ✅ Better decisions through comprehensive analysis
- ✅ Time saved can be redirected to mission work

Follow-Up Questions for Discussion

1. "How would this change your grant planning process?"
2. "What other financial scenarios would you want to model?"
3. "Who in your organization would benefit most from this?"
4. "What concerns do you have about AI handling budget data?"
5. "How could this improve your board reporting?"

Remember: The goal is to show how AI becomes a thought partner in financial strategy, not just a calculator with better UI.