AI Demo Guide for Movement Organizations

Your Guide to Exploring Human-AI Partnerships

Welcome to Your Demo Experience

These demonstrations showcase how AI can amplify your organization's impact while respecting your values and keeping your data under your control. Each demo uses sample data from a fictional social justice organization to illustrate real capabilities.

Demo Access

- **URL**: Visit the main website and add `?demo=preview` to the URL.
- **Password**: You'll receive this from your consultant
- **Duration**: Each demo session lasts 1 hour
- **Data**: All data is fictional but realistic

Three Demos to Explore

1. Financial Intelligence Co-Pilot

Purpose: Makes financial information accessible to all staff, not just the "money person"

What It Does:

- Translates between program language and financial terms
- Creates "what-if" scenarios for planning
- Analyzes budgets, grants, and financial reports
- Helps non-financial staff understand budget implications
- Models grant proposal scenarios and funding strategies

Try These Questions:

Current Operations:

- "What would happen if we lost our Ford Foundation grant?"
- "How much are we spending on youth programs compared to last year?"
- "Explain our Q3 financial health in simple terms"
- "What grants are expiring in the next 6 months?"
- "If we expanded legal aid by 20%, what would that cost?"

Grant Planning & Proposals:

- "What new grants are we applying for in 2025?"
- "How much total funding are we seeking across all proposals?"
- "Compare the personnel costs across our different grant proposals"
- "What would our budget look like if we only received 3 out of 5 pending grants?"
- "Which proposed grants have the most restrictions?"
- "How much are we requesting specifically for youth programming?"
- "What's the total indirect cost rate across all proposals?"
- "If the Ford Foundation grant is approved, how many new staff would we hire?"
- "Show me all capacity-building investments we're proposing"
- "What percentage of grant budgets go to direct client services vs. overhead?"

2. Knowledge Management Assistant

Purpose: Preserves and shares organizational wisdom across staff transitions

What It Does:

- Surfaces historical campaign strategies and outcomes
- Connects current challenges to past solutions
- Maintains institutional memory about partners and tactics
- Shares lessons learned across programs

Try These Questions:

- "What tactics worked for tenant organizing in Westside?"
- "Who are our key partners for legal support?"
- "What did we learn from past rent strike campaigns?"
- "How do we usually handle media for housing campaigns?"
- "What's our history with Westside Community Church?"

3. Impact Storytelling Engine

Purpose: Combines data and narratives to communicate your impact powerfully

What It Does:

- Connects quantitative metrics with human stories
- Creates audience-specific impact reports
- Identifies patterns and ripple effects across programs
- Generates compelling narratives for different stakeholders

Try These Questions:

- "Tell me a success story about our legal aid program"
- "What's our overall impact in Q3 compared to Q2?"
- "Create a brief impact summary for potential funders"
- "Show me the ripple effects of preventing evictions"
- "How many youth have we engaged this year and what changed for them?"

How to Evaluate the AI Responses

What Makes a Good AI Response

Accuracy: Information matches the source data
Relevance: Directly addresses your question
Context: Includes appropriate background information
Accessibility: Uses language appropriate to your role
Actionability: Provides next steps when relevant

Things to Check

1. **Source Citations**
   - The AI should reference specific documents or data
   - You can ask: "What source did you get that from?"
2. **Calculations**
   - Verify any math or percentages make sense
   - Ask for breakdowns: "Show me how you calculated that"
3. **Consistency**
   - Information should align across different questions
   - Try asking the same thing different ways
4. **Completeness**
   - The AI should acknowledge if it doesn't have certain information
   - It shouldn't make up data that doesn't exist

Demo Capabilities Showcase

Understanding Context

The AI can understand the relationships between different aspects of your work:

- How financial decisions impact programs
- How past campaigns inform current strategy
- How individual stories connect to systemic change

Test This: Ask questions that require connecting different types of information

Adapting Communication Style

The AI adjusts its language based on your needs:

- Technical financial details for finance staff
- Plain language explanations for program staff
- Compelling narratives for external audiences

Test This: Ask for the same information in different ways:

- "Explain our budget to a new board member"
- "Explain our budget to a program coordinator"

Scenario Planning

The AI can model different possibilities:

- Budget scenarios with various funding levels
- Program expansion or reduction impacts
- Strategic planning options

Test This: Ask "what if" questions about your programs or funding

Making Connections

The AI identifies patterns and relationships:

- Between different programs
- Across time periods
- Among various data sources

Test This: Ask about trends or patterns in the data

Questions to Explore Each Demo

Financial Intelligence Demo

1. **Basic Understanding**: "What's our total budget for 2024?"
2. **Comparison**: "How does Q3 compare to Q2 financially?"
3. **Scenario Planning**: "What if individual donations increased by 30%?"
4. **Grant Management**: "Which grants need renewal soon?"
5. **Program Costs**: "What's the cost per client for each program?"

Grant Proposal Analysis:

1. **Funding Pipeline**: "What's our total funding pipeline for 2025-2026?"
2. **Staffing Scenarios**: "How many new positions are included in pending grants?"
3. **Risk Assessment**: "What if we only get funded by MacArthur and Ford?"
4. **Budget Alignment**: "Do our grant proposals align with our strategic plan?"
5. **Comparative Analysis**: "Which grant has the lowest indirect cost rate?"
6. **Multi-Year Planning**: "Show me year 2 vs year 3 budget changes"
7. **Restriction Analysis**: "Which grants limit spending to specific programs?"

Knowledge Management Demo

1. **Historical Context**: "What campaigns have we run in the past 5 years?"
2. **Best Practices**: "What makes a successful tenant organizing campaign?"
3. **Partner Information**: "Tell me about our relationship with Unidos Legal"
4. **Tactical Knowledge**: "When is the best time for door-knocking?"
5. **Lessons Learned**: "What mistakes should we avoid in organizing?"

Impact Storytelling Demo

1. **Success Stories**: "Share a story about someone we've helped"
2. **Metrics Overview**: "How many people did we serve in Q3?"
3. **Outcome Analysis**: "What are the ripple effects of our youth program?"
4. **Funder Report**: "Create a one-paragraph impact summary for funders"
5. **Trend Analysis**: "How has our impact grown over time?"

Understanding AI Limitations

What the AI Cannot Do

- Make strategic decisions (it can only inform them)
- Access real-time data (it works with uploaded documents)
- Replace human judgment about your community
- Guarantee 100% accuracy (always verify important information)

Data Security in Demos

- All demo data is fictional
- Your questions aren't stored permanently
- No real client or donor information is used
- Each session is isolated and expires

Making the Most of Your Demo

Preparation Tips

1. Think about your current pain points
2. Identify decisions you need to make
3. Consider what information is hard to find
4. Note what takes too much time currently

During the Demo

1. Start with simple questions to get comfortable
2. Build up to more complex scenarios
3. Test the same question in different ways
4. Push boundaries to see capabilities and limits
5. Take notes on what would be most helpful

Questions to Consider

- How would this change our daily work?
- What time would this save our team?
- How would this help us serve more people?
- What concerns do we have about implementation?
- How does this align with our values?

After the Demo

Next Steps

1. **Discuss with Your Team**
   - What excited you most?
   - What concerns need addressing?
   - How would this fit your workflow?
2. **Identify Priority Use Cases**
   - Which demo addresses your biggest pain point?
   - What would create the most immediate value?
   - Where would you want to start?
3. **Consider Implementation**
   - What data do you already have?
   - Who would be the primary users?
   - What training would be needed?

Questions for Your Consultant

- How is our actual data kept secure?
- Can the AI be customized for our specific needs?
- What does implementation typically look like?
- How do other organizations use this successfully
- What ongoing support is available?

Quick Reference Card

Demo Shortcuts

- **Reset conversation**: Refresh the page
- **Get help**: Type "help" or "what can you do?"
- **See sources**: Ask "what's your source for that?"
- **Get examples**: Ask "can you give me an example?"

Key Phrases to Try

- "Explain this in simple terms"
- "What are the implications of…"
- "Compare X to Y"
- "What would happen if…"
- "Show me trends in..."
- "Tell me a story about..."

If Something Seems Wrong

1. Ask the AI to clarify or recalculate
2. Request the source information
3. Try rephrasing your question
4. Note it for discussion with your consultant

Contact & Support

During Your Demo:

- Take screenshots of helpful responses

- Note questions that weren't answered well
- Document your team's reactions

After Your Demo:

- Schedule a debrief with your consultant
- Share feedback with your team
- Consider next steps for your organization

Remember: These demos show what's possible. The real system would be customized with your organization's actual data, workflows, and needs while maintaining complete data sovereignty and alignment with your values.

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