

NFP Executive Exchange AI for Non-Profits: Growing and Engaging Supporters

April 23, 2026 8:30 to 09:30 am

175 George St. N ~ Station Boardroom

Every non-profit is trying to do three things: find supporters, grow relationships, and retain the people who care about their mission. Register for this session to explore how Artificial Intelligence (AI) can help make those things easier.

Presented by:

Sofie Andreou, AI Strategist & Educator

If you've worked with Sofie Andreou over the years, you already know her passion for helping organizations grow—and now she brings that same approach to AI, with her training sessions in demand across Ontario and beyond. Join her in Peterborough for an engaging, practical workshop where you'll leave with confidence, clarity, and tools you can start using right away.

Register now: pkchamber.ca/events

No Cost for Members

Future Members: \$25.00



www.SofieAndreou.com

UNLEASH THE POWER OF AI

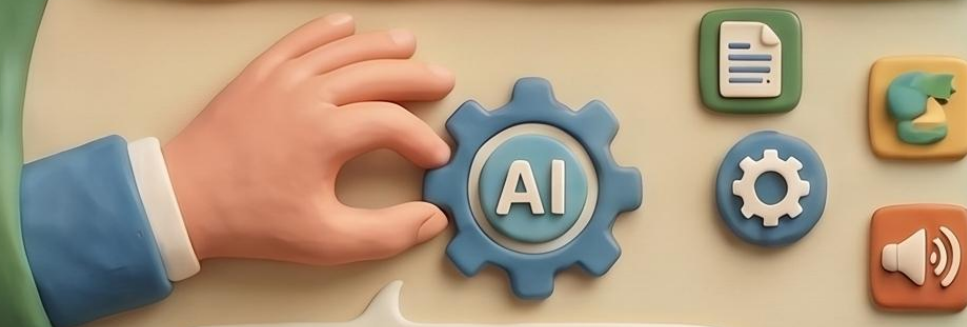
2026 NFP EXECUTIVE EXCHANGE

Context: Kick-off the first NFP Executive Exchange of 2026. Hosted by Peterborough & Kawartha Chamber of Commerce and Peterborough Area Fundraisers Network, AI Strategist Sofie Andreou, M.Eng., guides leaders to turn AI into a high-performing "junior assistant".

STRATEGIC MINDSET & FRAMEWORKS



MASTER THE REACT FORMULA



HIGH-IMPACT TAKEAWAYS



AI TOOL SELECTOR

BROWSER-BASED AI



Best Use Case: Deep research, creative brainstorming, and strategy.
Common Tools: ChatGPT, Gemini, Claude, Perplexity

EMBEDDED AI



Best Use Case: In-flow productivity and daily workflow efficiency.
Common Tools: Microsoft Copilot, Google Workspace

SPECIALIZED AI



Best Use Case: Advanced engagement and brand-aligned content.
Common Tools: HevCon (Avatars), Wix AI Chatbots

NotebookLM







Unleash the Power of AI for Not-for- Profits

Workshop Deliverables:

- ✓ Summary infographic (key concepts + use cases)
- ✓ Audio podcast version (for accessibility)
- ✓ Starter prompt sheet



AI Essentials for 2026: Your Survival Guide



AI Coffee Break Learning®
AI Essentials with Sofie

1



Master the Fundamentals

Understand the difference between browser-based and embedded AI and access your core toolkit.

2



Prompt Like an Executive

Use the REACT method (Role, Expectation, Action, Context, Tone) for high-quality results.

3



Gain a Competitive Edge

Use AI for agency-level market analysis and to find the 'marketing gold' in customer pain points.

4



Automate Your Daily Workflow

Master 'in-flow' intelligence in Google and Microsoft to automate your inbox, calendar, and documents.

5

Build Your Marketing Plan in Minutes

End the 'what to post' panic by generating content pillars and a 30-day master calendar.

6

Build Your First AI Assistant

Scale your presence 24/7 by training a custom chatbot on your specific business knowledge.

7



Create a "Corporate Brain"

Turn messy notes, PDFs, and videos into an intelligent knowledge system with NotebookLM.

8



Establish Your Safety Guardrails

Protect your data and empower your team with a clear company AI usage policy.



Choose Your Path to Mastery

AI Coffee Break Learning



\$19 CAD / month

- Flexible, ongoing access
- New weekly content added
- Video, Podcast & Infographics
- **Best for:** Continuous bite-sized learners

Coupon Code: "survivalguide"

May 21st

Trent Micro-credential

Coupon Code CC15



\$495 CAD (Total)

- 6-week intensive self-paced program
- Official University Badge
- **Plus Optional Live weekly coaching to create your own AI Solution! Thurs 5 to 6pm**
- **Best for:** Certification & Custom Solutions

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AI in Plain Language

What AI actually
does & how to get
found on AI.

Where AI fits in
daily work.

Human-in-the-
loop importance
(governance +
trust).



AI As Your New Employee

The Roles AI Can Play in Your Business



Think of AI
as your
assistant.
You must
train them.



AI as Your New Employee or Volunteer – Clear Prompts

The REACT Formula: Your Key to Clarity

R		Role: Who is the AI? (e.g., a brand strategist)
E		Expectation: What do you need? (e.g., a 3-paragraph description)
A		Action: What should it do? (e.g., create it using these details)
C		Context: What information does it need? (e.g., my product is...)
T		Tone: What should it sound like? (e.g., warm, storytelling)



AI as Your New Employee or Volunteer – Clear Prompts

How to Use Prompts

To get the best results, always treat AI as a junior assistant. You provide the context (the "seed"), and the AI provides the "draft." The quality of the output depends heavily on the quality of your input.

The Golden Formula: Context + Task + Constraints + Format.

For every prompt below, replace everything in [brackets and bold text] with your specific information.



**Act as a strategic advisor for a non-profit organization.
Help me clearly define our organization's positioning,
audiences, and communications plan.**

Organization: [name]

Mission: [what we do]

Programs/Services: [brief description]

Community/Region: [location]

Please provide the following:

1. Value Proposition

What makes our organization unique and why it matters in our community.

2. Audience Segments

Identify and describe these key groups:

- People who need our services
- Potential donors/sponsors/funders
- Volunteers
- Potential board members

3. For EACH audience segment, outline:

- Their main needs or motivations
- Their pain points or challenges
- How our organization helps solve those
- Why they would engage with us

4. Messaging for Each Audience

Provide simple, clear messaging tailored to each group that we can use in:

- website content
- newsletters
- social media

5. Content Ideas

Suggest 5 content ideas (blog or social posts) for each audience group.

6. 30-Day Communications Calendar

Create a simple 4-week plan that includes:

- weekly themes
- types of posts (story, impact, invitation, education)
- which audience each post targets

Keep everything practical, clear, and realistic for a small non-profit team.

**Act as a strategic advisor for a non-profit organization.
Based on the following information, identify and analyze
organizations that may be considered similar or alternatives to us.**

Organization: [name]
Mission: [what we do]
Programs/Services: [brief description]
Community/Region: [location]

Please complete the following:

- 1. Identify 3–4 organizations that could be considered:**
 - Direct competitors (similar services)
 - Indirect competitors (similar audience or funding sources)
- 2. For each organization:**
 - Briefly describe what they do
 - Who they serve
- 3. Analyze their:**
 - Website messaging and clarity
 - Social media presence and engagement
 - Visibility in AI/search (how easily they are found or described)

- 4. Provide a table with the following columns:**
 - Organization Name
 - Strengths (what they do well)
 - Weaknesses (gaps, missed opportunities)
 - What We Can Do Better (specific, practical ideas)

- 5. Based on this analysis, provide:**
 - 3 ways our organization can better differentiate itself
 - 3 messaging improvements we should make
 - 3 content or outreach ideas to strengthen our visibility and engagement

Keep the analysis practical, realistic, and relevant for a small to mid-sized non-profit organization.

◆ 10 AI Prompts for Non-Profits

Simple, practical prompts to save time and strengthen your work

1. Donor / Supporter Thank-You

Write a warm and sincere thank-you message to a supporter.

Organization: [name]

Contribution: [donation/volunteer/sponsorship]

Program: [program name]

Impact: [what their support helped achieve]

Tone: appreciative and community-focused

2. Turn Program Notes into a Report Update

Turn the following program notes into a short, professional update for a funder or board report.

Focus on outcomes, impact, and clarity.

Keep it concise and easy to read.

Notes: [paste notes]

3. Grant Writing Starter

Help me draft a strong response for a grant application.

Organization: [name]

Program: [program]

Community need: [problem being addressed]

Impact: [expected outcomes]

Make the writing clear, compelling, and aligned with funder expectations.

4. Create a Monthly Impact Summary

Turn the following data into a one-page monthly impact summary for stakeholders.

Highlight key achievements, outcomes, and community impact.

Data: [paste stats or notes]

5. Board Report Summary

Turn these updates into a clear and concise board report summary.

Include key achievements, challenges, and next steps.

Notes: [paste updates]



◆ 10 AI Prompts for Non-Profits

Simple, practical prompts to save time and strengthen your work

6. Event Promotion Content

Create promotional content for our upcoming event.

Event: [name]

Purpose: [fundraising / awareness / community]

Audience: [who you want to attend]

Provide:

- 1 email invitation
- 2 social media posts
- 1 short event description

7. Re-Engage Past Supporters

Write a friendly message reconnecting with past supporters who haven't engaged recently.

Include a short update about our impact and an invitation to reconnect.

Tone: warm, appreciative, and not pushy.

8. Staff / Volunteer Communication

Draft a clear and positive internal message to staff/volunteers.

Topic: [update/change/event]

Tone: supportive, clear, and motivating

Keep it easy to understand and action-oriented.

9. Create a Simple Engagement Plan

Create a simple 3-month engagement plan for our organization.

Include ideas for:

- donor/supporter updates
- community engagement
- events or outreach

Keep it realistic for a small team.

10. Turn One Update into Multiple Communications

Take the following update and turn it into:

- a newsletter paragraph
- a social media post
- a short donor update

Keep messaging consistent but adapted for each format.

Update: [paste content]



AI as Your New Employee or Volunteer – Clear Prompts

The Nonprofit AI Prompt Library (Simplified List)

- Quarterly Report Narrative Generator
- Board Meeting Minutes Summarizer
- Grant Needs Assessment Section Creator
- Budget Justification Narrative Draft
- Internal Compliance Memo Writer
- Volunteer Recruitment Campaign Creator
- Event Script & Run-of-Show Generator
- Beneficiary Story & Fundraising Appeal Writer
- 'Red Team' Grant Proposal Reviewer
- Post-Grant Sustainability Strategic Brainstormer



AI as Your New Employee or Volunteer – Clear Prompts

The 1 of 10 AI Prompts for Nonprofit/GFO Professionals

Category 1: Frequent Report Generation (Compliance & Funding)

1. Data to Narrative: Quarterly Performance Report (QPR) This prompt turns raw data into the narrative required by government funders.

Prompt: "Act as a professional program manager. I need you to draft the 'Progress Narrative' section for our Quarterly Performance Report for our primary government funder, [Name of Funder/Department].

The goal: Summarize this quarter's achievements based on the data below, highlighting how we met our KPIs, explaining any variances (positive or negative), and linking these results back to our original grant objectives.

Here is the raw data/notes for this quarter: [Paste data, anecdotal success stories, and program notes here.]

Our original grant objectives and KPIs are: [Paste key objectives/KPIs here.]

Format: Write this in a concise, professional, and compliant tone. Use bullet points for key achievements. Keep the section to [e.g., 500 words]. Identify one clear success story to feature."



AI as Your New Employee or Volunteer – Clear Prompts

The 10 of 10 AI Prompts for Nonprofit/GFO Professionals

10. AI-Assisted Strategic Brainstorming: Post-Grant "What's Next?" This is a critical prompt for the Board and ED to plan for the time *after* a major grant cycle.

Prompt: "Please act as a senior strategy consultant for a nonprofit. We are nearing the end of our current 3-year funding cycle for our largest program, [Program Name], which is [90%] government-funded.

The task: We need to brainstorm our strategic options to ensure program continuity. Please generate a SWOT analysis (Strengths, Weaknesses, Opportunities, Threats) and outline **4 distinct strategic directions** we should explore.

Program Details: [Paste 1 paragraph about the program and its success, plus 1 paragraph about the current budget and funding cliff.]

Strategic options to consider: (Examples: Diversification (fee-for-service), New Grant Alignment (finding different agencies), 'Sunsetting' parts, Merger/Partnership, Endowment Campaign)."



Getting Found Has Changed!



Getting Found Has Changed!



THE OLD WORLD: SEO (Search Engine Optimization)



The Goal: Clicks

SEO was a competition to rank on page one of search results to drive traffic to your website.

The Method: Ranking Factors

Success depended on mastering keywords, building backlinks, and writing content for search algorithms.



“SEO optimized for traffic. Not truth.
The primary measure of success was attracting visitors, regardless of the quality of the answer.”



The User's Role: Do the Work

The user had to click through multiple links, seen pages, and decide for themselves what the best answer was.



THE NEW WORLD: GEO (Generative Engine Optimization)



The Goal: Answers & Citations

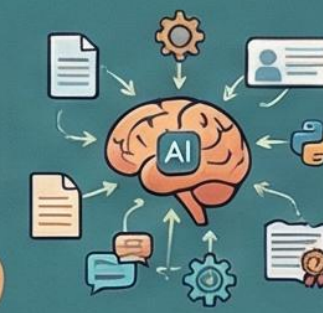
GEO is the strategy of optimizing your digital presence so AI systems choose to cite you as the definitive answer.

The Method: Authority Signals

Success depends on establishing clarity, consistency, and credibility across your entire digital footprint.



“You're no longer competing for the best link. You're competing to be the most trusted source.
Visibility is now about being the authority, as website visits are no longer guaranteed.”

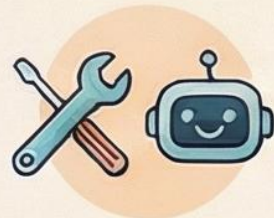


The AI's Role: Do the Work

The AI synthesizes information from trusted sources and delivers a single, direct answer to the user.



HOW TO WIN IN THE AGE OF AI: YOUR GEO STRATEGY



1. Build Specialized AI Agents

Create custom GPTs (for ChatGPT) and Gems (for Gemini) to package your expertise and literally teach AI how to represent your business.



2. Train AI on Your Digital DNA

Use "Custom Instructions" in ChatGPT and "Personal Context" in Gemini to consistently define your expertise, role, and region.



3. Achieve "Brand Triangulation"

Ensure radical consistency between your website, LinkedIn profile, and other high-authority mentions. AI cross-references these to verify you are a trusted entity.

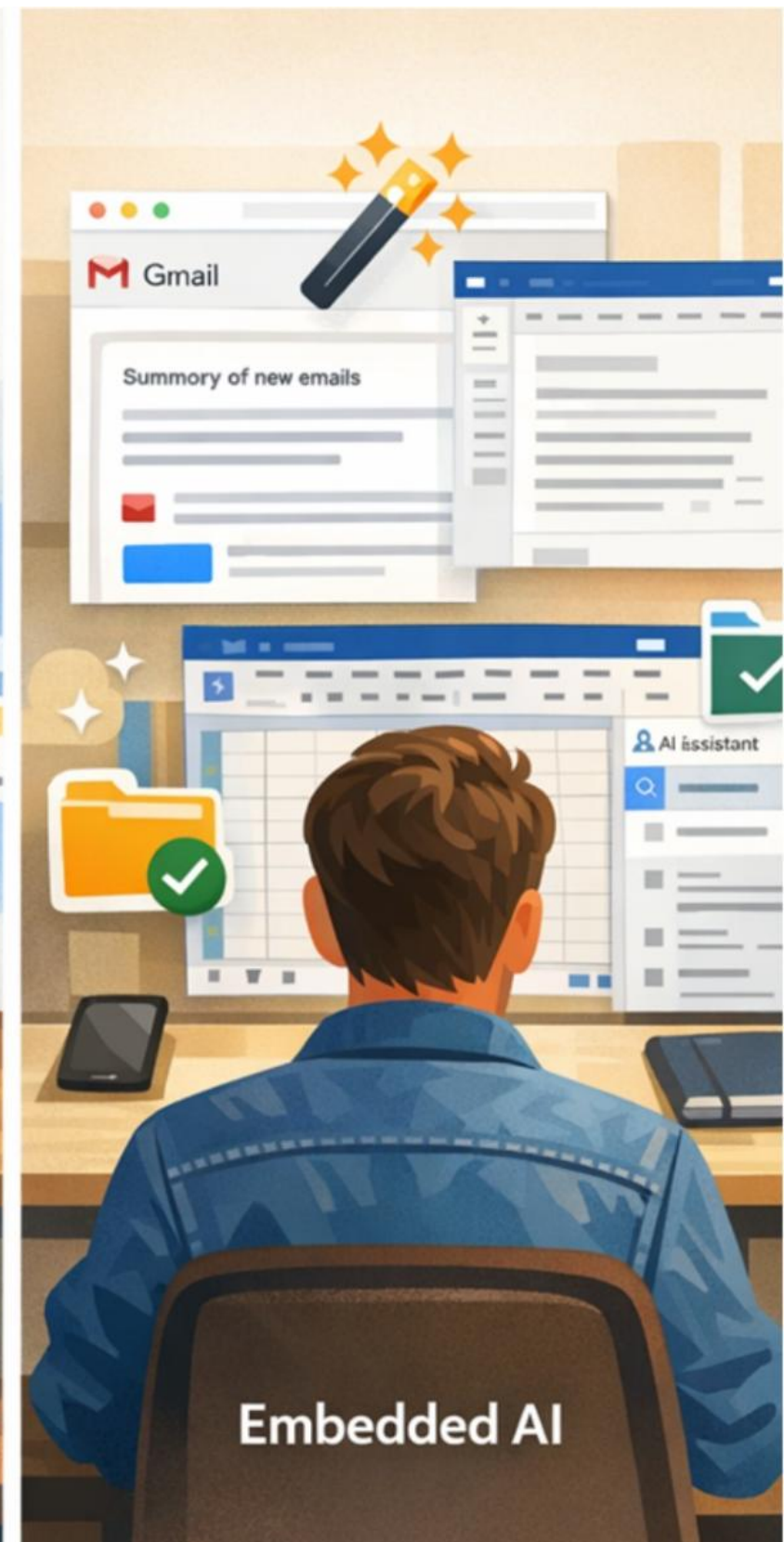
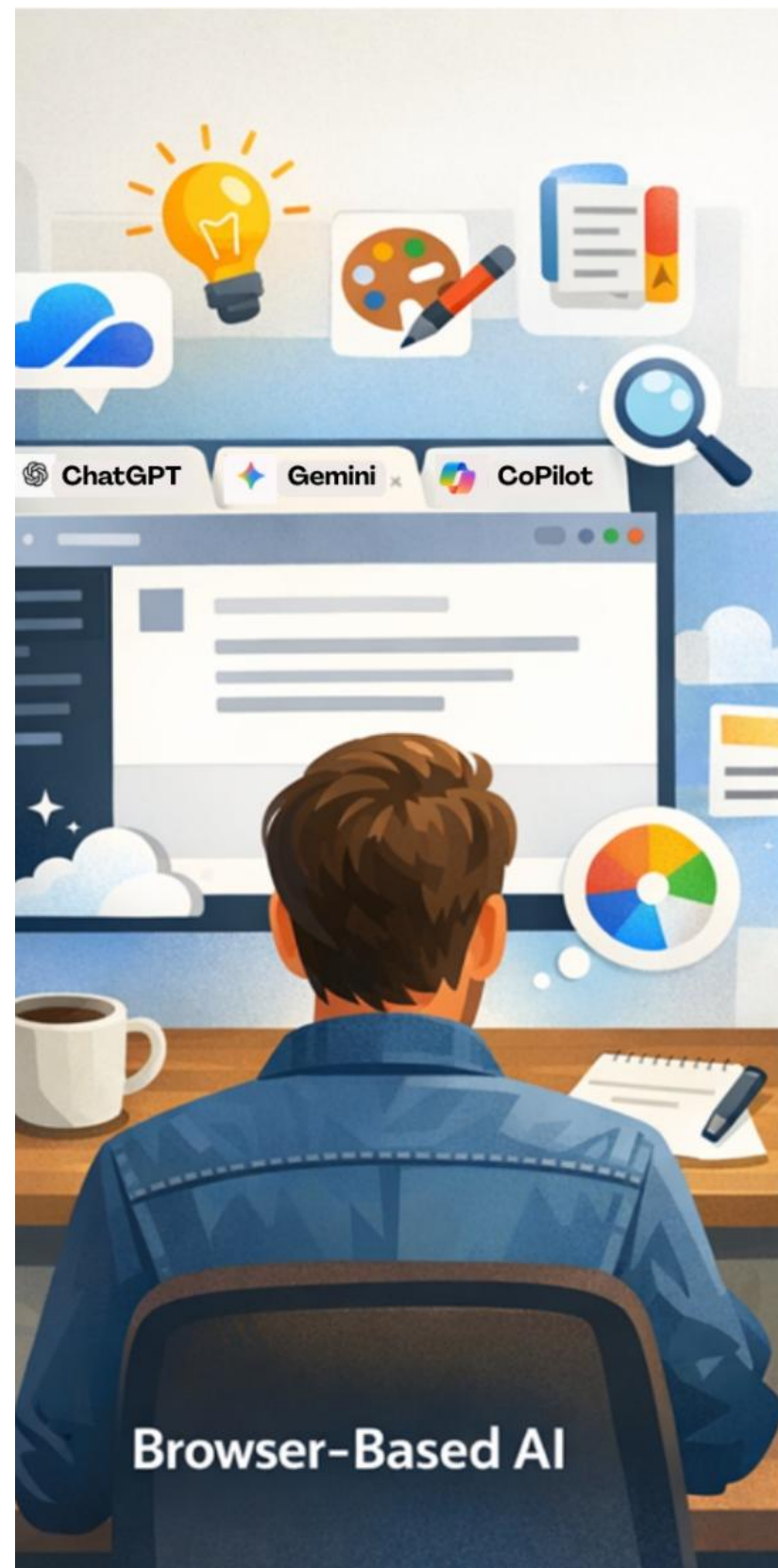
The Takeaway: Be Intentional. You are no longer optimizing for search engines. You are optimizing for answers.



Introduction – Types of AI



www.SofieAndreou.com

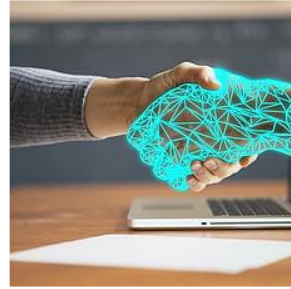


AI - Overview



Browser

- ChatGPT.com
- Gemini.google.com
- Grok
- Perplexity
- Claude.ai



Embedded

- Microsoft's Copilot
 - Excel
 - Word
 - PP
 - Teams
 - Outlook
- Google's Gemini
 - Docs
 - Drive
 - Gmail
 - Meets
- Zoom
- Canva



Purpose Built

- HeyGen
- Industry Specific
- ChatBots like Tidio
- <http://elevenlabs.io/>
- NoteBookLM
- Synthesia
- GEMs
- GPTs



Safe AI Use in Your Environment

Gemini Within
Google or
Microsoft 365
Copilot vs
Public AI

Data Information
Files Separated:
Client information
Financials
Internal
documents

- “What is safe to use where”



Using AI Safely

Know Your Tools: Where You Work Matters

Public Brainstormers (Browser AI)

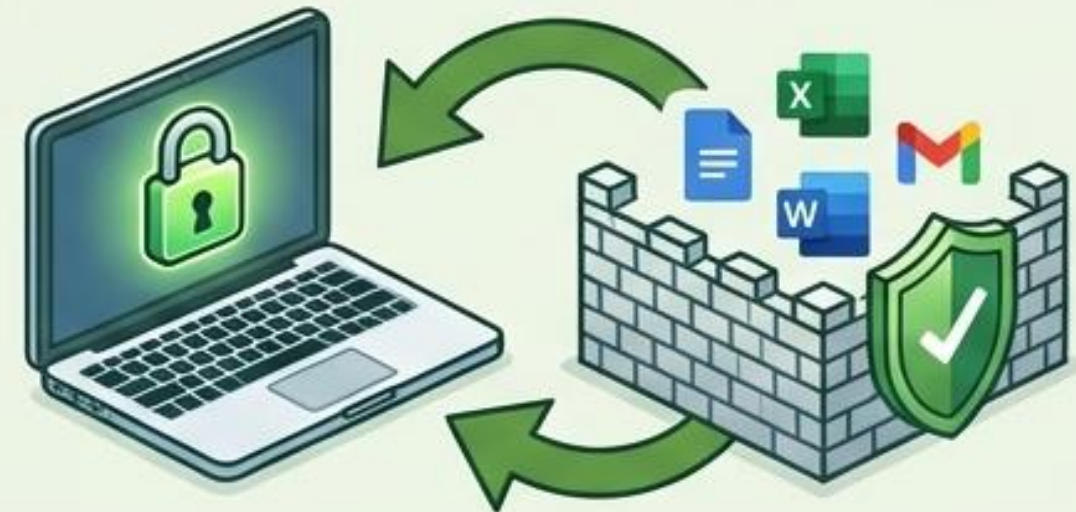


ChatGPT, Google Gemini, Claude.
Data trains the public model.



**Use ONLY for non-sensitive,
public knowledge.**

Secure Co-pilots (Embedded AI)



Microsoft Copilot, Google Workspace AI.
Data stays within your secure ecosystem.

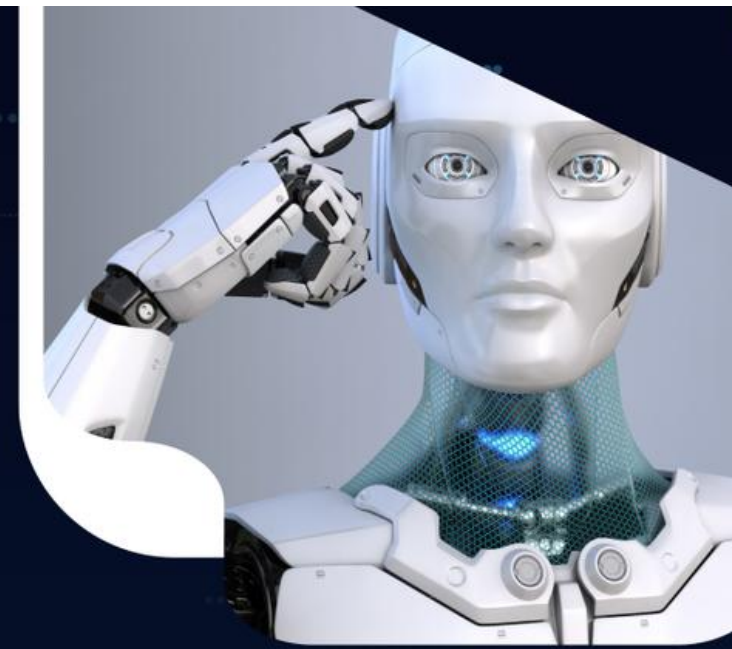


**Safe for internal data and
proprietary files.**

The Mandate: You must audit and track exactly which platforms your staff are accessing.
Creative tools like Canva AI and CapCut must also be vetted.

What is AI Governance? (Simple Definition)

- » AI Governance = the rules, people, and processes that guide how your organization adopts and uses AI safely. Governance answers:
- ✓ *Who approves AI tools?*
 - ✓ *How do we evaluate risk?*
 - ✓ *Where is AI allowed?*
 - ✓ *How do we check for accuracy + bias?*
 - ✓ *Who is accountable if something goes wrong?* ✨
 - ✓ *How often do we review our AI processes?*



New ChatGPT Image Generator!





“How Do You Think
Non-Profits Are Using
Chatbots to Grow
Supporters?”

What Happens Without vs With an AI Chatbot

Without Chatbot

- ✗ Visitor lands on website or social
- ✗ Has a question (“How do I volunteer?”)
- ✗ Can’t find answer quickly
- ✗ Leaves

👉 Lost:

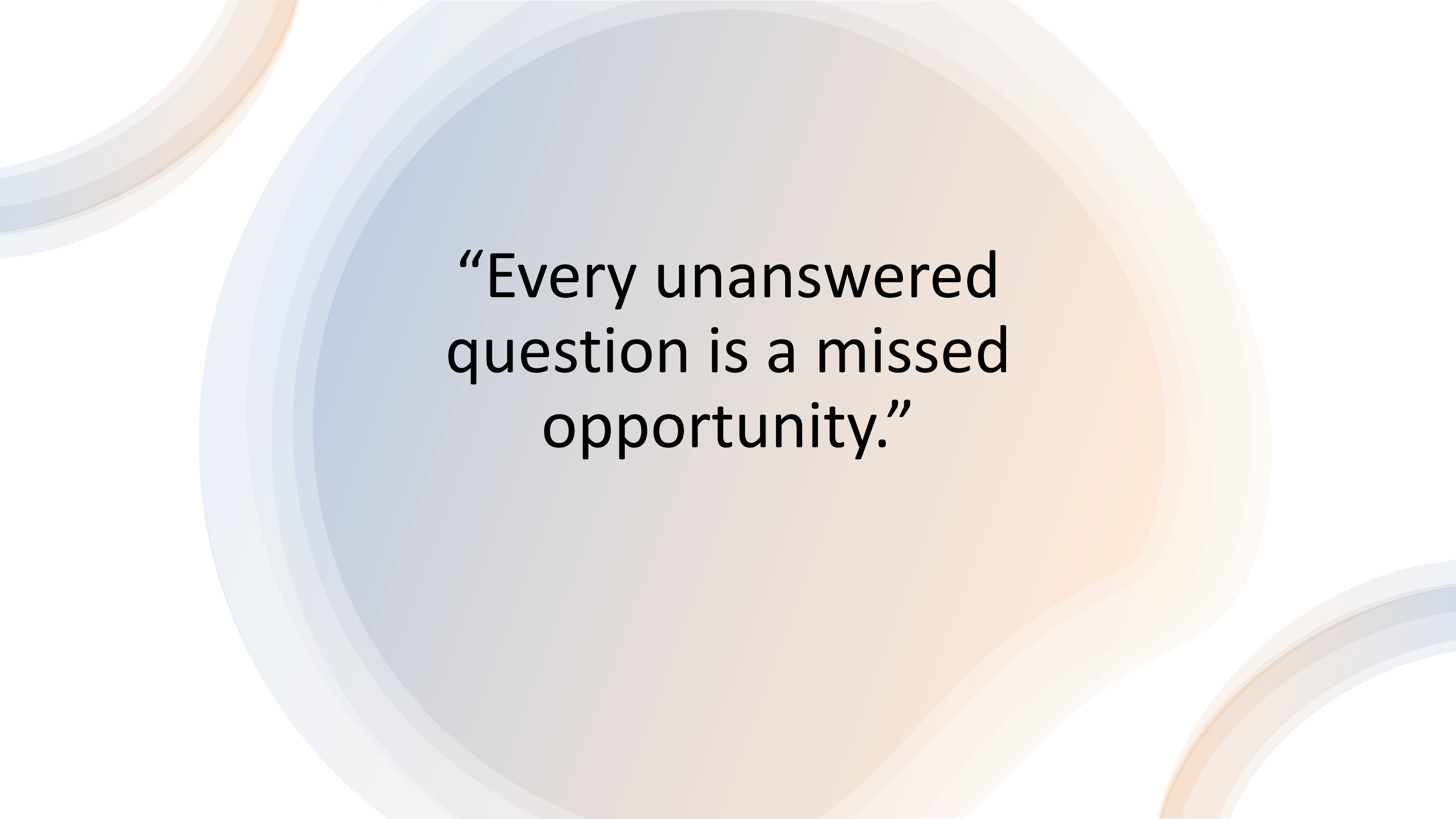
- donor
- volunteer
- supporter

With Chatbot

- ✓ Visitor lands on website or social
- ✓ Chatbot asks: *“How can I help you today?”*
- ✓ User clicks: “Volunteer”
- ✓ Gets instant answer + link
- ✓ Feeds AI these answers too!

👉 Gained:

- volunteer
- engagement
- donor

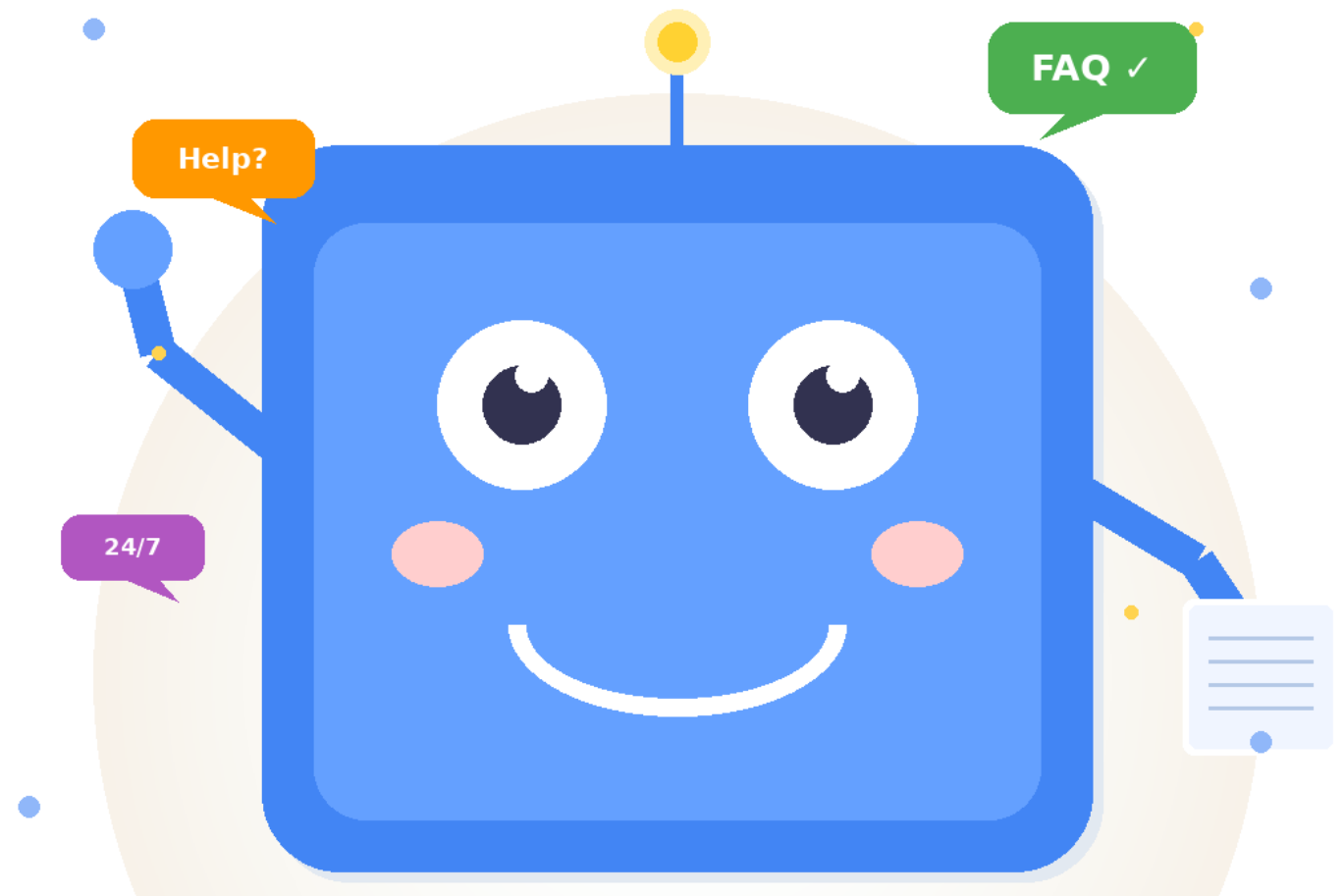


“Every unanswered
question is a missed
opportunity.”

“What This Looks Like for YOU”

“5 Potential Roles of a Chatbot”

1. Assist when you're occupied
2. Respond to inquiries
3. Establish trust
4. Boost volunteers
5. Boosts Donations



“What This Looks Like for YOU”

A Simple Chatbot for Your Organization

Use one example (VERY important)

Example: Camp Kawartha

Chatbot says:

“Hi! Looking to get involved?

I can help you:

- Volunteer
- Donate
- Learn about our programs”

Click: “Volunteer”

Response:

“That’s great! We’re always looking for volunteers.

Here are current opportunities: [link]

Would you like help finding the right fit?”

Click: “Donate”

Response:

“Your support helps connect youth with nature and education programs.

You can donate here: [link]

Would you like to see the impact of your donation?”

“What This Looks Like for YOU”

You Don’t Need an “IT” department to Do This.

Step 1

Take your existing content:

- FAQ page
- Volunteer page
- Donation page

Step 2

Use AI to generate responses

Prompt:

Act as a chatbot for our organization.

Use the following information to answer questions about:

- volunteering
- donations
- programs

Keep responses friendly, short, and helpful.

Content:

[paste website content]

Step 3

Plug into a tool (non-technical)

- GPT, Chatbase, Tidio, ManyChat, Wix AI chatbot

“What This Looks Like for YOU”

**You Don’t Need an “IT”
department to Do This.**

**Ask AI to help you write your
Chatbot Prompt!**

Act as a website chatbot for our organization.

Your role is to:

- answer common questions
- help users volunteer
- guide users to donate
- explain our impact

Organization: [name]

Create:

- 5 FAQ responses
- 2 volunteer responses
- 2 donation responses



“Right now, if someone asks ChatGPT ‘Where can I volunteer in my area?’ ... are you confident your organization would be mentioned?”



“A chatbot is one of the easiest ways to start fixing that.”



Pro Tip

👉 “If you build a chatbot, you should also turn its answers into a public FAQ page on your website & your Google Listing!”



Why?

Because:

Chatbot = private

FAQ page & Google Listings = searchable

🔥 That's where the **real AI visibility gain** happens



**You are
now visible =
Getting Found
on AI!**

- ✓ Chatbots
- ✓ Content
- ✓ Messaging
- ✓ AI visibility
- ✓ Targeted Engagement



Into ONE story:

“Better answers → better content
→ better visibility → more
supporters”



Camp Kawartha Program & Visitor Guide

By community builder 

Which Camp
Kawartha program
is right for my...

How do I book an
outdoor education
trip for my school?

What volunteer
opportunities does
Camp Kawartha...

How can I donate
or support
Camp Kawartha?

+ Ask anything



Build Your Own AI Assistant:

Your Always-On Digital Helper



A chatbot is a trained AI assistant that uses your specific information to answer questions, guide customers, or support your team 24/7. This guide breaks down the simple, no-code process to build your own.



1. Define Its Purpose



- Who is it for?
- What problem will it solve?

Common Uses



Customer Support



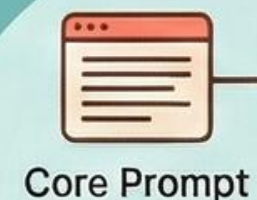
Staff Onboarding



Answering FAQs



Marketing Assistance



Core Prompt



Your Business Information

2. Give It a “Brain”

Use a core prompt and your business information to provide its knowledge base.

3. Choose a No-Code Tool



ChatGPT
(Custom GPTs)



Gemini



4. Launch Responsibly



Never upload sensitive data



Always keep a human in the loop for review

Build Your Own AI Assistant: Tidio.com

The screenshot displays the Tidio AI assistant interface. On the left, the 'Inbox' sidebar shows 'LIVE CONVERSATIONS' (Unassigned, My open, Solved) and 'TICKETS' (Messages from your mailbox or offline chat widget, Connect mailbox). The main area shows a list of tickets under 'Unassigned', with the selected ticket from 'GL Heritage Brewing Company' (Facebook: Sofie Andreou & Associates) titled 'FANTASTIC breakout session, Sofie! ...'. The ticket details show a message from the company praising a breakout session. The right sidebar contains 'TICKET INFO' (Handling time: 39d 18h 42min, SLA, Add policy), 'CUSTOMER DATA' (GL Heritage Brewing Company, Email, Phone, Add a customer tag, Add a contact property, View chat conversation), and a 'SATISFACTION SURVEY' section.

Inbox

Search in Inbox...

LIVE CONVERSATIONS

- Unassigned
- My open
- Solved

TICKETS

Messages from your mailbox or offline chat widget

Connect mailbox

Unassigned

- My open
- Solved

Views

- Messenger
- Instagram
- WhatsApp

AGENTS

Unassigned

Newest

Ticket #18165

Assignee: Unassigned | Status: Open | Priority: Normal

FANTASTIC breakout session, Sofie! Really appreciated you sharing your knowledge and the many tangible actions we can take to take as business owners and tourism collaborators! Very inspiring.

Ticket #18165 created from the comment on a Facebook post on 4 Mar 2026, 13:43

Sofie Andreou & Associates about a month ago

GL Heritage Brewing Company Mar 4, 1:43 PM

FANTASTIC breakout session, Sofie! Really appreciated you sharing your knowledge and the many tangible actions we can take to take as business owners and tourism collaborators! Very inspiring.

To: GL Heritage Brewing Company

Enter a ticket message or type / to insert a Macro

Submit as PENDING

TICKET INFO

- Handling time: 39d 18h 42min
- SLA: Add policy
- Add ticket tag...

CUSTOMER DATA

- GL Heritage Brewing Company
- Email...
- Phone...
- Add a customer tag...
- Add a contact property...
- View chat conversation

SATISFACTION SURVEY

- We are not collecting satisfaction ratings on Messenger.

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www.SofieAndreou.com

Build Your Own AI Assistant: Tidio.com

tidio.com/panel/lyro-ai/data-sources/added

Connect your support mailbox to Tidio and handle all customer requests in one place [Connect mailbox](#)

Lyro AI Agent Usage and plan [Upgrade](#)

Data sources [Test Lyro](#) [+ Add knowledge](#)

Lyro will use the knowledge you add here to answer customer questions.

Search by keyword or URL Show: All Sources: All Used by: All Audiences: All ↓ Newest first

Results: 12

☐	Name	Source	Used by	Audience	Last updated	
☐	Does Sofie Provide AI Governance and Policy Services?	Manual	✓ Lyro ✓ Copilot	Everyone	Feb 12, 2026, 3:50 PM	⋮
☐	Does Sofie Offer GEO Training? What is GEO?	Manual	✓ Lyro ✓ Copilot	Everyone	Feb 12, 2026, 3:48 PM	⋮
☐	Service Area	Manual	✓ Lyro ✓ Copilot	Everyone	Feb 12, 2026, 3:46 PM	⋮
☐	What is included in Coffee Break Learning?	Manual	✓ Lyro ✓ Copilot	Everyone	Dec 19, 2025, 10:10 AM	⋮
☐	youtu.be/wTflst_a0Mw	Website	✓ Lyro ✓ Copilot	Everyone	Dec 19, 2025, 9:56 AM	⋮
☐	youtu.be/AieJNlzSeds	Website	✓ Lyro ✓ Copilot	Everyone	Dec 19, 2025, 9:53 AM	⋮
☐	youtu.be/0Jowia0cWZU	Website	✓ Lyro ✓ Copilot	Everyone	Dec 19, 2025, 9:52 AM	⋮



Build Your Own AI Assistant Your Onboarding Client or Staff Assistant

NotebookLM: From Information Clutter to Automated Clarity

What is NotebookLM?

Your Personal AI Knowledge Assistant

It transforms scattered documents into an intelligent "corporate brain" you can talk to.



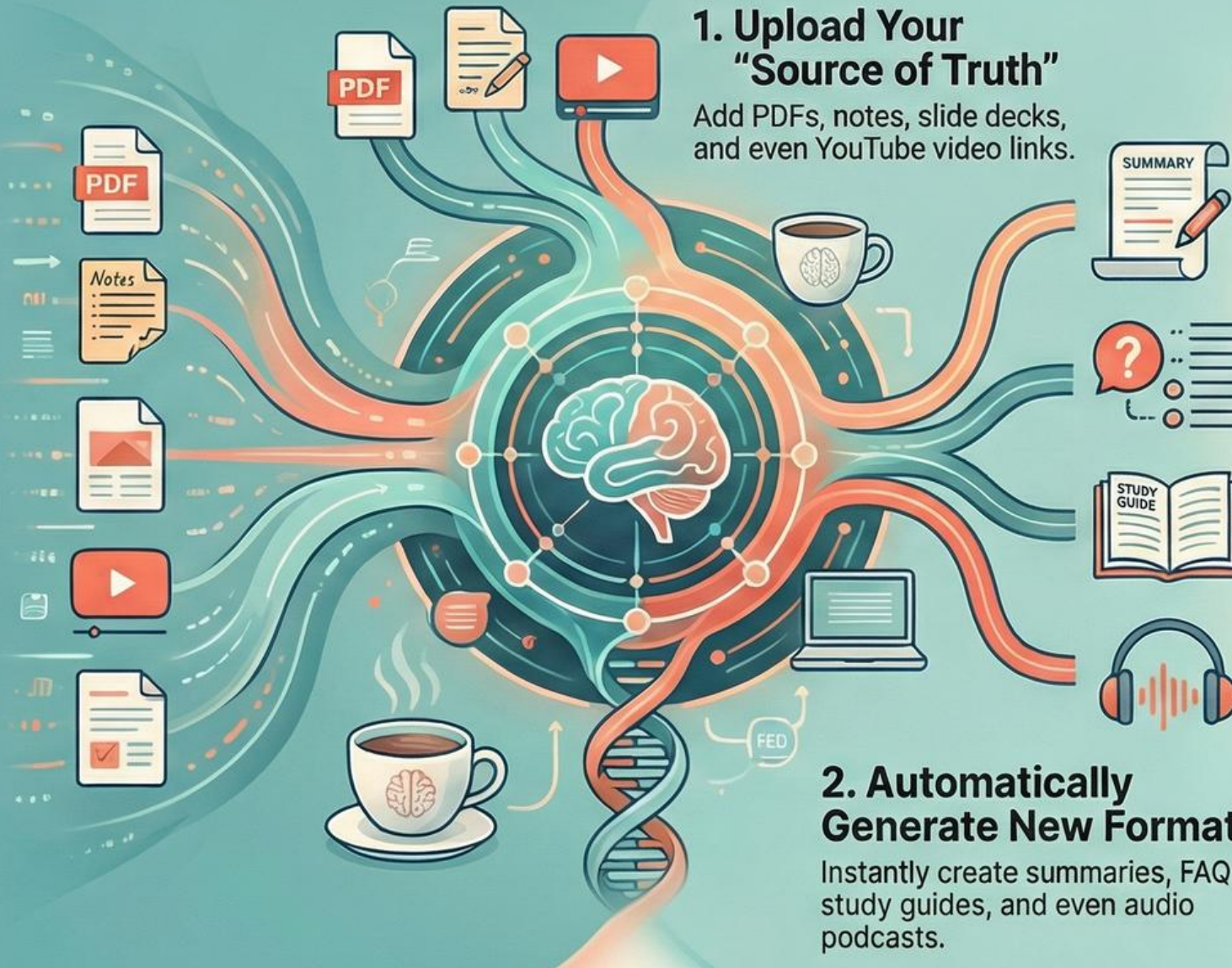
Grounded in YOUR Sources

It works exclusively with the materials you provide, ensuring high accuracy and relevance.

How It Turns Knowledge into Action

1. Upload Your "Source of Truth"

Add PDFs, notes, slide decks, and even YouTube video links.



2. Automatically Generate New Formats

Instantly create summaries, FAQs, study guides, and even audio podcasts.

The Strategic Advantage

Scale Your Expertise, Not Your Effort



Perfect for onboarding staff, training teams, and answering client questions.

Look Prepared & "Lightning Fast"



Preserve company knowledge and make your expertise accessible to your team 24/7.



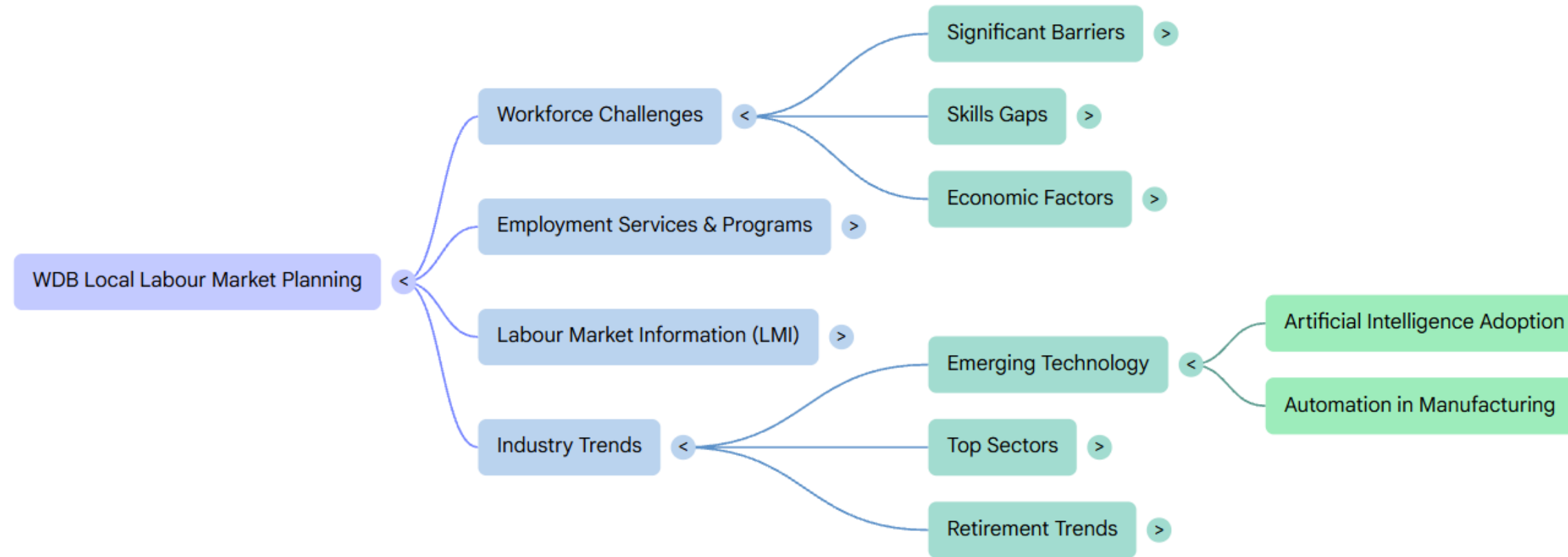
🏁 The Real Goal

You're showing:

- ✓ “Stop reading 80-page reports”
- ✓ “Start using your knowledge instantly”

WDB Local Labour Market Planning Architecture

Based on 11 sources





Partnering for Prosperity: A Business Guide to the Workforce Development Board (WDB)



The Workforce Development Board (WDB) serves as a vital link between the government and the local labour market in Northumberland, Peterborough, Kawartha Lakes, and Haliburton. It provides expert data and coordinates employment services to help businesses navigate the evolving economic landscape.

Meet Your Community Heroes



Who is the Workforce Development Board?
A not-for-profit funded by the Ministry of Labour to provide local labour market information and coordinate training services.



The Leadership Team:
Led by CEO Jennifer Lamantia and Business Support and Project Coordinator Eleni Gagovski to drive regional workforce innovation.



Serving Our Communities:
WDB identifies trends and opportunities to address labour needs across Peterborough, Northumberland, Kawartha Lakes, and Haliburton.

Step 1: Access Local Intelligence



Use the **LMI Help Desk** to identify in-demand occupations and set competitive salaries for your job postings.



LMI Help Desk



In-Demand Occupations & Competitive Salaries

Step 2: Utilize the Jobs Hub



Access the interactive **Labour Market Gateway** and **Regional Job Map** to monitor local recruitment and search behavior.



Labour Market Gateway & Regional Job Map



Monitor Local Recruitment & Search Behavior

Step 3 & 4: Invest and Plan for the Future



Step 3: Invest in Your Workforce.
Connect with the Canada-Ontario Job Grant and apprenticeship resources to fund training and address critical skills gaps.



Step 4: Stay Informed for the Future.
Download the annual Local Labour Market Planning Report to understand demographics and plan for long-term growth.



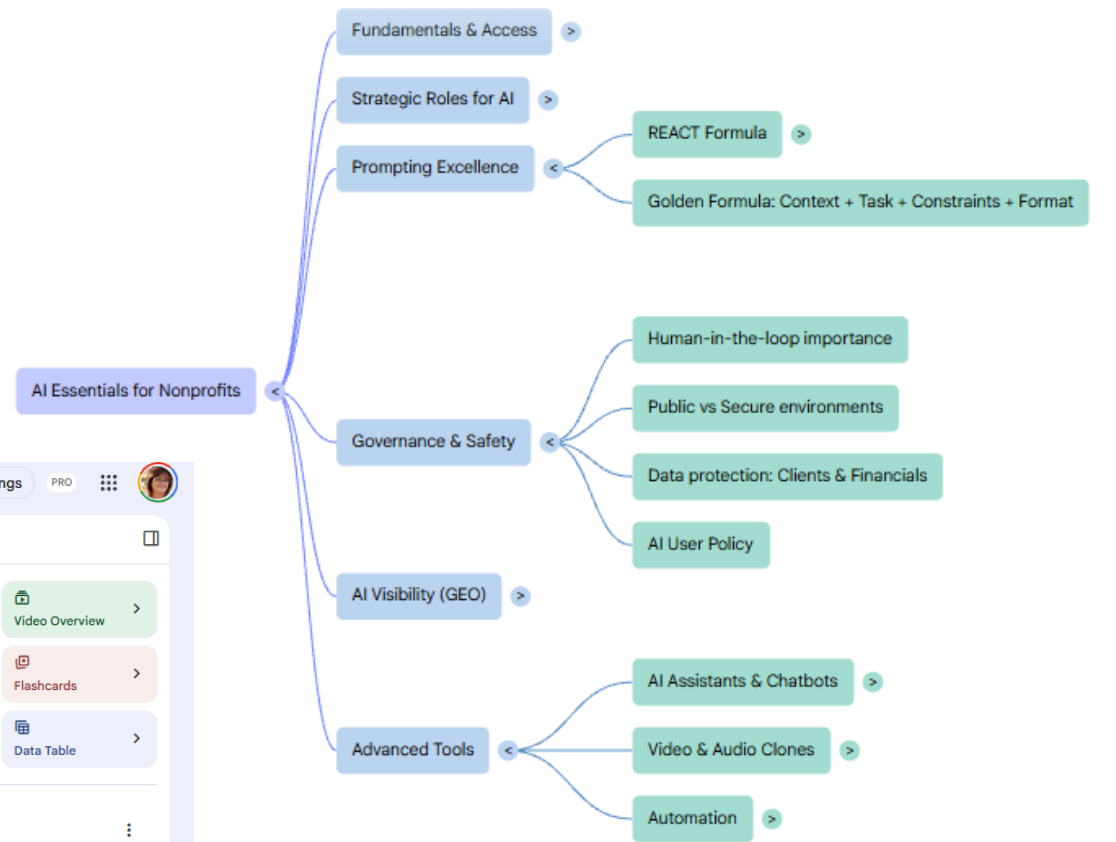
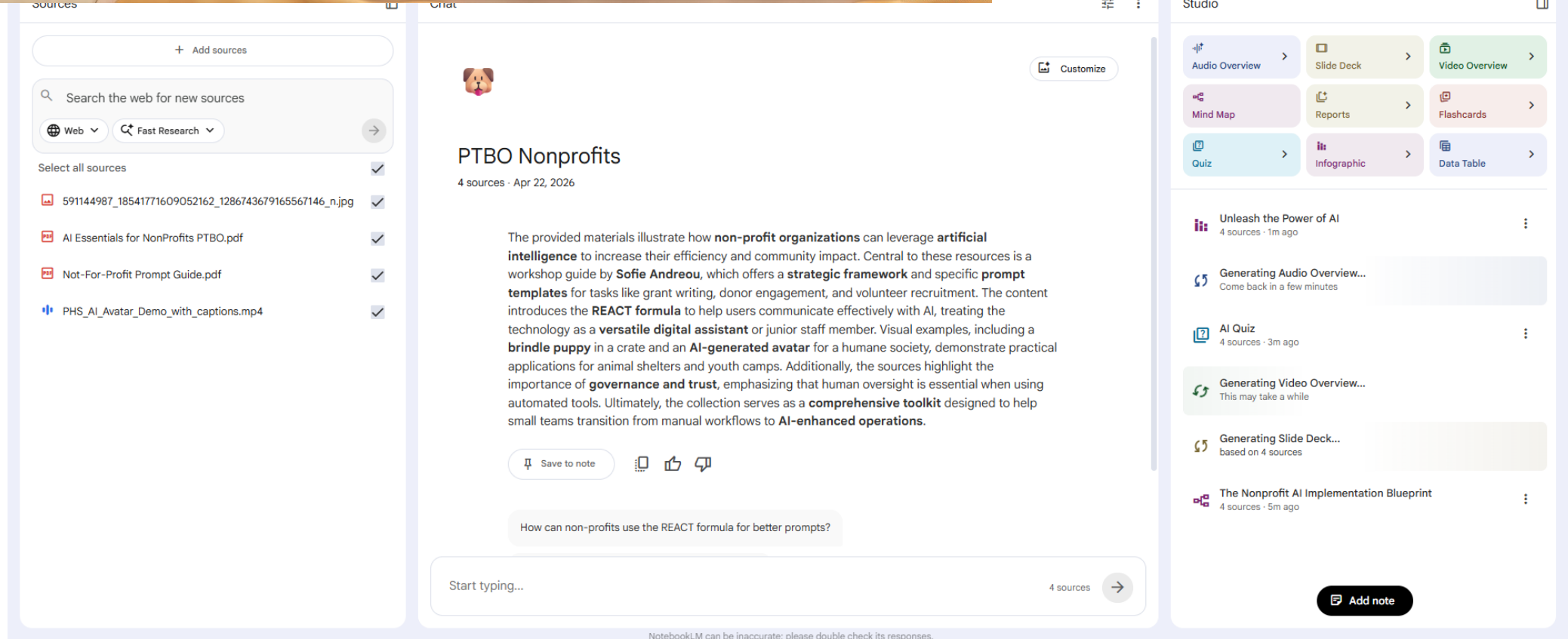
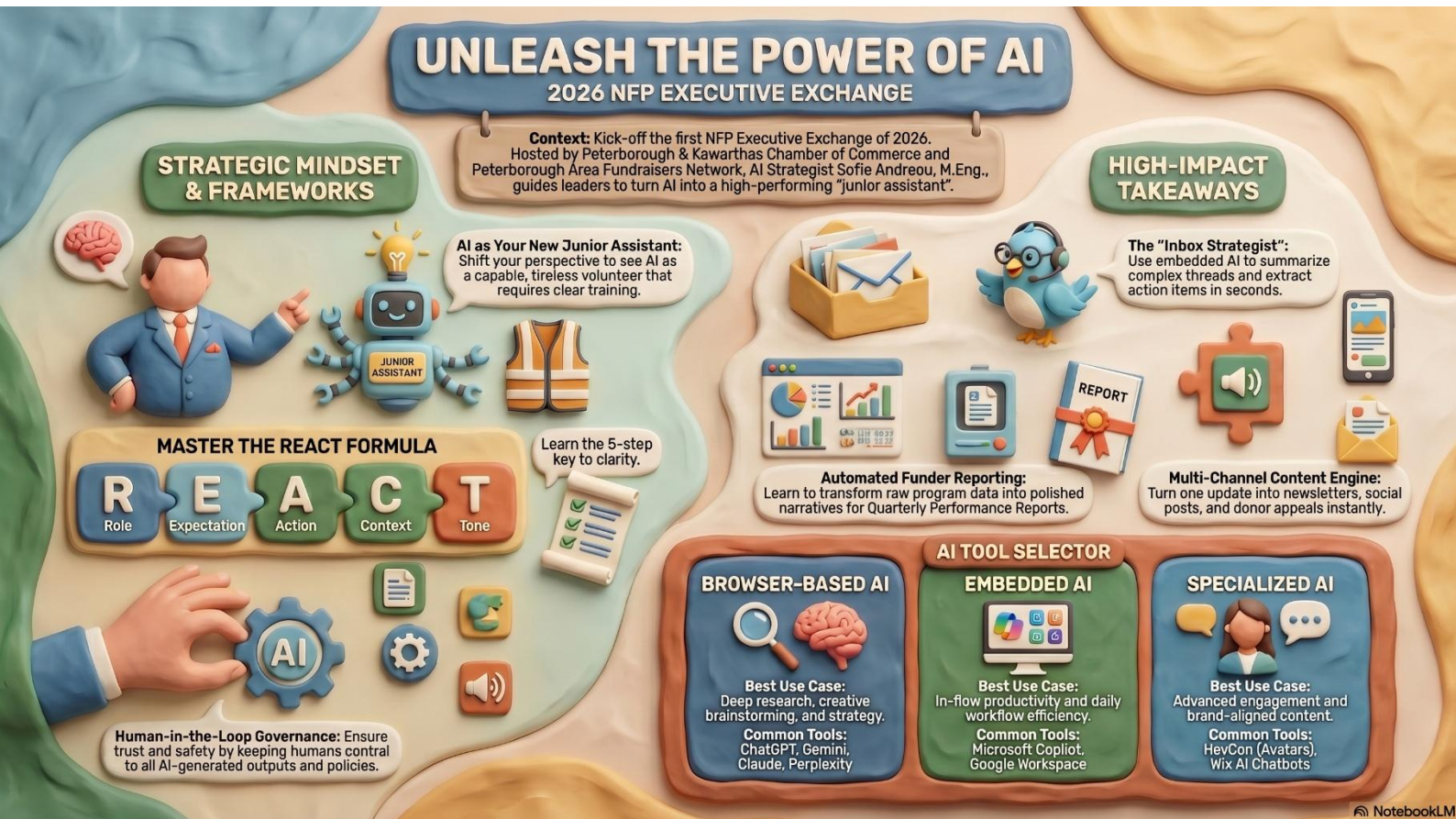
Training & Skills Gaps



Demographics & Long-Term Growth



Business Prosperity



<https://notebooklm.google.com/notebook/d7262ba9-a998-4f2f-902c-2e900420f785>

“While many organizations manage to hold meetings without difficulty, their true challenge is often remembering the information discussed and promises made.”



“If you’re in a boardroom or meeting space or volunteer meeting or grant writing session... just press record in the Otter.app, put your phone in the middle of the table, and you’re done.”

“Make sure everyone knows you’re recording.”



AI Possibilities



www.SofieAndreou.com

- Managing Email Overwhelm → Find, Action, Automation → Faster and More Professional
- Create Strategic Plans & Communications Plans -> Segmentations, Pain Points, and Messaging
- Financial reviews & reports in Excel → trends, flags, summaries, creating interactive dashboard & reports
- Competitive/market research → quick insights to responding to Grants
- Build AI ChatBots or Onboarding Support for Staff, Voluteers, Board Members or Donors → Answers FAQs and 7/24 Access
- Creating your AI Governance & User Policy – Governance Check-List & User Policy Template
- AI Clone Videos Strategy & Practice – Introduction to HeyGen & Steps to creating your own AI Avatars or Clones

Safely Using AI Within as an Inbox Assistant

AI Productivity & Automation | Module 4

The 'Inbox Strategist'

The Problem:



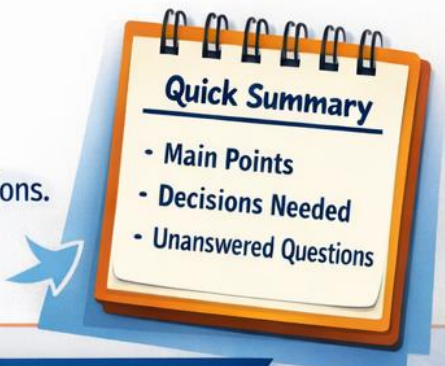
- ▶ Returning to work and facing a chaotic Outlook thread can be overwhelming.

The Built-In Solution:



- ▶ Press "Summarize by Copilot"
- ▶ Key topics & action items extracted
- ▶ Citations linked to original messages

The Value:



- ▶ Get a quick "CliffNotes" version of lengthy conversations.

 **Get Up to Speed in Minutes!**

Embedded AI: In-flow productivity

- **The Problem:** Managing a large volume of unread emails from a client or a complex project thread can be overwhelming and time-consuming.
- **The Built-in Solution:** Open the email thread in Outlook and use the Copilot (in Outlook). You can prompt by asking, *"Summarize the key decisions made in this thread and list the outstanding questions I need to answer."*
- **The Value:** This feature saves over half an hour of manual reading, delivering results within seconds.

Safely Using AI Within as an Inbox Assistant

Embedded AI: In-flow productivity

The screenshot shows a Gmail interface with a blue header and a left sidebar. The main content area displays an email from Shari Cole. An AI assistant overlay is visible on the right side of the email, showing a draft of a reply. The AI assistant is titled 'Can you make my reply ...' and contains a draft of a reply to the email. The draft includes the text: 'the presentation.', 'Looking forward to a great session!', 'Best regards,', 'SofieDraft 2: Concise and Action-Oriented', 'Hi Shari and Todd,', 'The final presentation for Monday's webinar is attached.', and 'To confirm the post-webinar materials, I will be sending you the edited recording.' The AI assistant also has a 'Send' button and a 'Gemini' logo. The email being replied to is from Shari Cole (cfwo.ca) and contains the text: 'Hi, here is the Final Presentation for the Webinar! After delivery, I'll record edit, upload it to the NotebookLM too, and send you the NotebookLM link (although it doesn't change from the one already in the PP), resend the PP, final INFO graphics, Podcast, and video replay! Can we sign jump on the webinar 15 mins early so I can make you co-host to let people in after we start? Looking forward to it! Sofie'.

Gmail Interface:

- Header: Gmail logo, Search mail, and user profile.
- Left Sidebar: Compose, Inbox (101,793), Starred, Snoozed, Important, Sent, Drafts (69), Purchases (621), Social (17,789), Updates (90,242), Forums (321), Promotions (149,358), More, Labels (+), [Imap]/Sent.
- Main Content: Email from Shari Cole (cfwo.ca) with a reply draft.

Email Content:

From: sofie andreou <sofie@sofieandreou.com>
Sent: Thursday, 16 April 2026 19:27:20

Shari Cole (cfwo.ca)

Hi, here is the Final Presentation for the Webinar! After delivery, I'll record edit, upload it to the NotebookLM too, and send you the NotebookLM link (although it doesn't change from the one already in the PP), resend the PP, final INFO graphics, Podcast, and video replay!
Can we sign jump on the webinar 15 mins early so I can make you co-host to let people in after we start?
Looking forward to it!
Sofie

AI Assistant Draft:

Can you make my reply ...

the presentation.

Looking forward to a great session!

Best regards,

SofieDraft 2: Concise and Action-Oriented

Hi Shari and Todd,

The final presentation for Monday's webinar is attached.

To confirm the post-webinar materials, I will be sending you the edited recording.

Ask Gemini

Gemini in Workspace can make mistakes. [Learn more](#)



“How many of you have ever stared at a grant question and thought... where do I even start?”

Instead of starting from scratch, I'm going to
give AI the context it needs."

PROMPT:

Act as a grant writing specialist for a non-profit organization.

Help me draft a strong response.

Organization: [Community Youth Mentorship]

Mission: [Supporting youth through mentorship and life skills]

Community: [Youth in Peterborough]

Grant question:

[Describe the community need and expected outcomes.]

Program:

[Weekly mentorship sessions for youth]

Community need:

[Many youth lack access to consistent mentorship and support]

Expected outcomes:

[Improved confidence, school engagement, and life skills]

[Write a clear, professional, impact-focused response.]

Safe use of AI in Microsoft Documents, including Word integration and AI-powered coaching, automation for creating, accessing, and interpreting internal files.

The screenshot displays the Microsoft Word application window. The ribbon at the top includes tabs for File, Home, Insert, Draw, Design, Layout, References, Mailings, Review, View, Help, and Acrobat. The Home tab is active, showing options for Clipboard, Font, Paragraph, Styles, and Editing. The document content is a business plan outline for a growing local manufacturer. The outline includes a title, a subtitle, and two main sections: 1. Executive Summary and 2. Company Overview. The Executive Summary section contains a list of bullet points detailing company overview, problem/need, traction, competitive advantage, growth plan, funding request, financial highlights, and milestones. The Company Overview section is partially visible. On the right side, the Copilot sidebar is open, showing a prompt to create a business plan outline for a growing local manufacturer. The sidebar also includes a search bar and a button to edit the prompt.

File Home Insert Draw Design Layout References Mailings Review View Help Acrobat

Comments Editing Share

Paste Font Paragraph Styles Editing

Create PDF and Share link Create PDF and Share via Outlook Request Signatures Dictate Add-ins Editor Copilot

Adobe Acrobat Voice Add-ins

Business Plan Outline (Growing Local Manufacturer)

Outline for an investor-/lender-ready plan to support growth funding.

1. Executive Summary

- Company overview (who you are, what you make, where you operate)
- Problem/need in the market and your solution/value proposition
- Traction to date (revenue growth, major customers, capacity utilization, repeat orders)
- Competitive advantage (quality, lead times, certifications, IP, cost position)
- Growth plan in one paragraph (what will change in the next 12-36 months)
- Funding request summary (amount, type: debt/equity, intended uses)
- High-level financial highlights (historical + 3-5 year forecast snapshot)
- Milestones and expected returns/-payback (for lenders) or exit paths (for investors)

2. Company Overview

Today

Prompt: "Please create an outline for a Business Plan for a growing local Manufacturer. They are looking for funding."

Copilot

Lining things up...

Edit

Describe what you'd like to edit

AI-generated content may be incorrect

Safe use of AI in Microsoft Documents, including Word integration and AI-powered coaching, automation for creating, accessing, and interpreting internal files.

FileHomeInsertDesignLayoutReferencesMailingsReviewViewHelpAcrobat

Paste

Clipboard

Aptos Display (Headings)

16

B

I

U

x₂

x²

A

Aa

A⁺

A⁻

Paragraph

Normal

No Spacing

Heading

Editing

Create PDF and Share link

Create PDF and Share via Outlook

Request Signatures

Dictate

Add-ins

Editor

Copilot

Comments

Editing

Share

Executive Summary

This Prompt Library is a practical, ready-to-use toolkit designed to help not-for-profit organizations produce high-quality work faster—without adding headcount. It provides a set of tested AI prompts that staff can copy, customize, and reuse to support common nonprofit functions such as funder reporting, grant development, internal communications, volunteer recruitment, event planning, and strategic planning.

Built for small teams and resource-constrained environments, the library is especially useful for Executive Directors, program managers, grant writers, finance/administration leaders, and board or committee support roles. Prompts are organized by real-world workflows—from turning raw program data into compliant quarterly narratives, to drafting budget justifications, to creating board-ready summaries and multi-channel fundraising and volunteer campaigns.

The intent is not to replace staff expertise, but to accelerate first drafts and improve consistency. Using the “Context + Task + Constraints + Format” approach, teams can feed the AI their specific details (mission, program notes, KPIs, budget lines, audience, tone, and word limits) and receive structured drafts that are easier to refine, approve, and share. When used well, this reduces time spent on blank-page drafting, increases clarity for funders and stakeholders, and frees capacity for higher-value work like relationship-building and program delivery.

Responsible use note: Always review and edit AI outputs before distributing externally. Avoid entering confidential client information; anonymize case studies and remove personal identifiers. Verify facts, dates, and compliance references to match your funder’s requirements and your organization’s policies.

Contents

Act as a strategic advisor for a non-profit organization. 2

How to Use These Prompts 3

The 10 AI Prompts for Nonprofit/GFO Professionals 3

Category 1: Frequent Report Gen 3

Category 3: Communications (Staff, volunteers, Board) 4

Can you write an executive summary for this Prompt Library, aimed at Not for Profit organizations? funding.”

Copilot

I added a new **Executive Summary** section at the start of your document (before the Contents) tailored to **not-for-profit organizations**. It explains what the Prompt Library is, who it’s for, what workflows it covers, the benefits teams should expect, and includes a brief **responsible-use** note (review, anonymization, and fact/compliance checks).

If you tell me your intended audience (e.g., EDs only vs. staff + board) and your org’s tone

Edit

Describe what you'd like to edit

AI-generated content may be incorrect

Page 1 of 6

1918 words

English (Canada)

Text Predictions: On

Accessibility: Good to go

Focus

94%

ProTip:

Productivity – Microsoft 365 + Copilot Access Model

Copilot in PowerPoint, Word, Outlook or Excel can access files stored in the SAME FOLDER ONLY!

Copilot can only access:

- Files in your **OneDrive for Business**
- Files in your **SharePoint** sites
- Files in **Teams** channels
- Files shared with you inside Microsoft 365
- Emails and calendar (depending on prompt and permissions)

It cannot access:

- Your desktop (unless synced)
- Dropbox or Google Drive
- External cloud storage
- Files outside your Microsoft 365 tenant

It respects:

- File permissions
- SharePoint site permissions
- Teams channel permissions
- Microsoft Graph security boundary



Embedded AI Copilot Automation

Microsoft Copilot and Power Automate

Thinking Layer: Copilot

Helps write, summarize, analyze, and create inside Word, Excel, PowerPoint, Outlook, and Teams

Automation Layer: Power Automate – Tasks across APPs

Automates workflows across Microsoft 365 apps, SharePoint, Outlook, Teams, and hundreds of connectors. IE “Every Monday, scan my Outlook and SharePoint activity from the previous week, summarize anything related to loan applications, and send me one email report.”



Embedded AI Google/Gemini Automation

Gemini & Google Studio

Thinking Layer: Gemini

Helps write, summarize, analyze, and create inside Google Docs, Sheets, Slides, Gmails, Drive, Google Meets, ...

Automation Layer: Google Studio – Tasks across APPs

Automates workflows across Google Docs, Sheets, Slides, Gmails, Drive, Google Meets, . IE “Every Monday, scan my Gmail and Google Doc Folder Names [_____] activity from the previous week, summarize anything related to [_____], and send me one email report.”



Go To HeyGen & Create an Avatar

● Create Your AI Voice or Clone (Advanced)

* Clone your voice or likeness using:

* ElevenLabs or

* HeyGen

* Upload:

* Your voice

* Your image/video

You can talk in ANY language too!



Video Creation

Using AI Voice Help – Step 1: Create A Script!

🟢 Step 1: Start with a Prompt Requesting a Script (ChatGPT or NotebookLM)

Define:

- * **Purpose** (educate, promote, reassure)
- * **Audience** (e.g., nervous patients, busy parents)
- * **Tone** (warm, calming, friendly)
- * **Length** (30–60 seconds)
- * **Outcome** (book an appointment, build trust)

👉 Prompt example:

Please write a 30 second script for HeyGen, with 4 scenes please. that shares all the different ways to get involved at the Humane Society, donations, volunteers, 50/50 or join the fur-ever club! Of course adpot

<https://peterboroughhumanesociety.ca/>

<https://peterboroughhumanesociety.ca/support-us/ways-to-donate/>



Using AI Voice Help – Step 1: From Scripts to Clones! From ChatGPT

30-Second HeyGen Script (4 Scenes)

Scene 1 – Opening (Warm + Inviting)

Visual: Friendly staff member or animal close-up (dog/cat looking at camera)

Voiceover:

Hi, it's the team at the Peterborough Humane Society...

There are so many ways you can make a difference for animals in our community.

Scene 2 – Adoption & Volunteering

Visual: Clips of animals interacting with people, volunteers walking dogs or caring for animals

Voiceover:

You can adopt and give a pet a second chance at a loving home...

or volunteer your time and be part of the care and connection our animals need.

Scene 3 – Donations & Programs

Visual: Donation moment, staff caring for animals, overlay text “Fur-ever Club” and “50/50 Lottery”

Voiceover:

You can donate to support shelter, medical care, and daily needs...

join our Fur-ever Club for ongoing impact...

or take part in our 50/50 Lottery.

Scene 4 – Closing CTA (Emotional + Clear)

Visual: Happy adopted pet / animal being cuddled, logo or website on screen

Voiceover:

Every action, big or small, helps change an animal's life.

Visit us online to learn more... and thank you for being part of their journey.



Go To HeyGen & Choose Your Avatar (Create Yourself or Choose One of there's) !

Avatar videos

Untitled Video

Brand System

Generate

Script

Type your script or use "/" for commands

Upload audio

Script Writer

Drag to resize



00:00 / 00:00

1x



+

+ Add scene

Avatar

My AvatarsPublic Avatars

Search

AllProfessionalLifestyleUGCCommunity

Annie57 looks

Armando8 looks

Amelia12 looks

Georgia5 looks

AvatarAI ToolsMediaElementsMusicCaptionsScreen RecorderTemplatesLayersInteractivity

Continue in HeyGen with Scene by Scene (start with a short video to practice)

Avatar videos

Demo CFWO Loan Officer

Brand System

Generate

Script

> Did you know your local business idea could be the next success story in your community?

Direct voice

2 At Community Futures Western Ontario, our Loan Officers don't just fund businesses — they help build them. From startups to expansions, we provide flexible financing and expert guidance.

3 We've supported hundreds of entrepreneurs across Western Ontario — creating jobs, strengthening local economies, and turning ideas into thriving businesses.

4 Reach out to us for a free information session. See how you can make a real impact in your business and your community. Let's grow local — together.

+ Add scene

cfwesternontario.ca
Your Idea Matters

Did you know your

00:00 / 00:43 1x

1 Your Idea Matters 6.7s

2 Funding + Support

3 "Real Community Impact"

4 cfwesternontario.ca

+

Avatar & Voice (Scene 1)

Avatar Pamela Pamela

Voice Pamela

Motion Engine Avatar III

Avatar Background Customize Remove Color

Layout Original Circle

Radius 0 px

Zoom 100 %

Scene rendered

Avatar

AI Tools

Media

Elements

Music

Captions

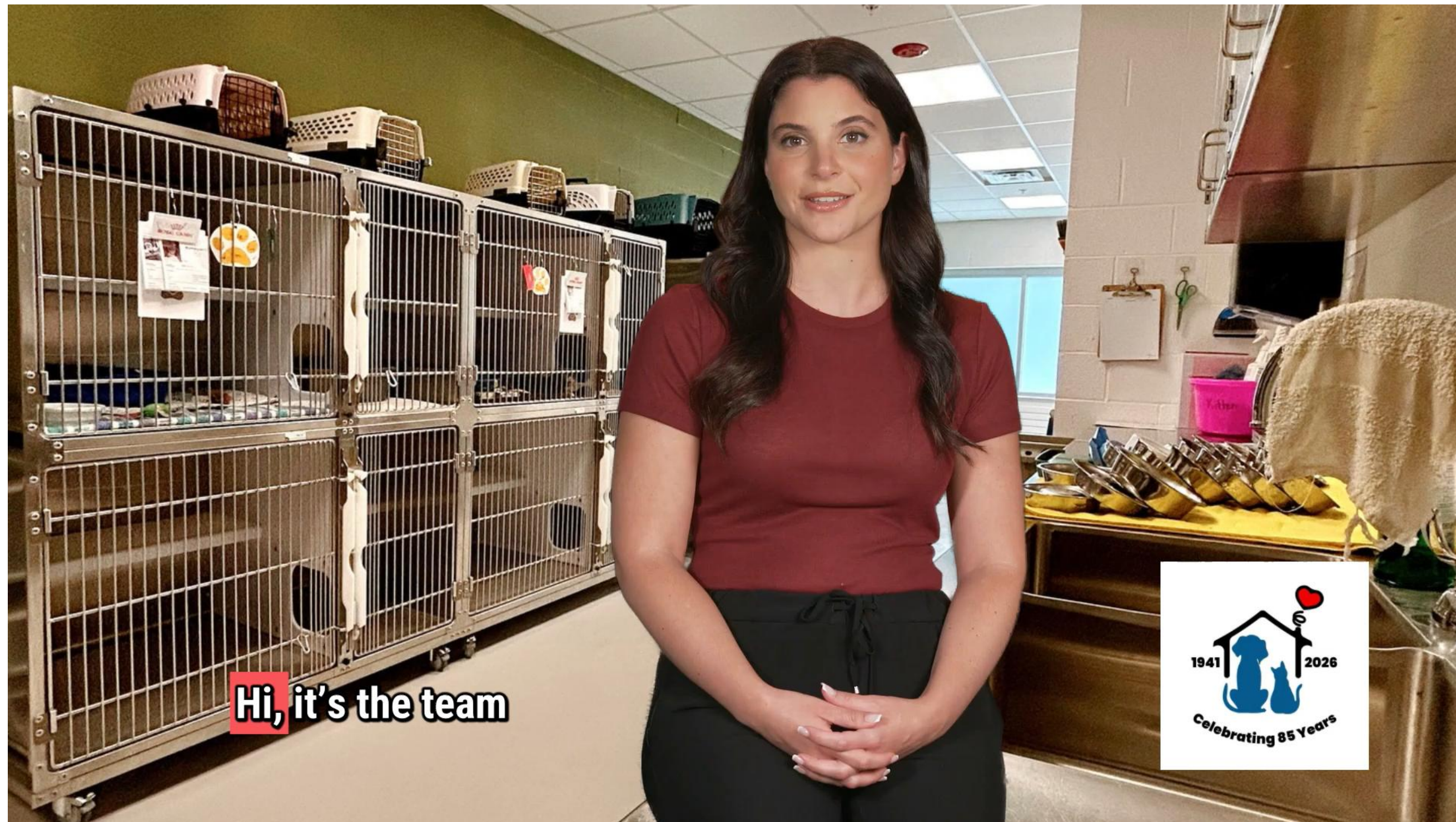
Screen Recorder

Template

Layers

Interactivity

Using AI Video Tips to Help – From Scripts to Clones!





Priorities ways can AI assist you?

AI offers significant opportunities to improve various areas.

Please rate the following in order of priority to you, with one being the highest:

- Automation of repetitive tasks
- Enhancing efficiency in long-term projects or activities
- Development of guided AI prompts
- Handling frequently asked questions
- Onboarding and succession planning systems (like the NotebookLM video we recently reviewed)
- Creation of AI video avatars for consistent, brand-aligned content
- Establishment of AI governance and usage policies

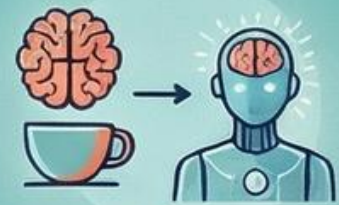




AI Professional Building Blocks

Your 8-Step Path to AI Mastery

AI Essentials with Sofie



1. Understand What AI Really Is

Learn that AI is a powerful tool—like a new digital team member, not magic.



2. Master Prompts with the REACT Formula



2. Master Prompts with the REACT Formula

Communicate clearly with AI (Role, Expectation, Action, Context, Tone) to get quality results.



3. Gain Instant Market Intelligence

Use AI to analyze competitors and segment customers in minutes, not weeks.



4. Automate Your Workflow

Save hours by using AI to handle repetitive tasks and connect the tools you already use.



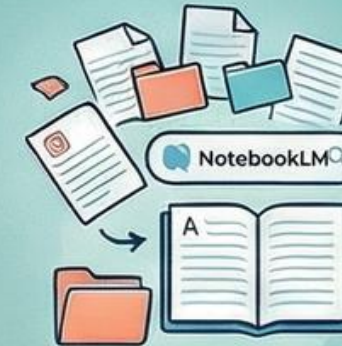
5. Build Your AI-Powered Marketing Plan

Move from random posts to a consistent, strategic 30-day content calendar.



6. Create Your First AI Assistant

Build a 24/7 chatbot to answer questions and support your team—no coding required.



7. Organize Knowledge with NotebookLM

Turn your scattered business documents into an interactive training and learning system.



8. Implement AI Governance & Security

Establish clear policies and guardrails to use AI safely and protect your business data.

www.SofieAndreou.com



Choose Your Path to Mastery

AI Coffee Break Learning



\$19 CAD / month

- Flexible, ongoing access
- New weekly content added
- Video, Podcast & Infographics
- **Best for:** Continuous bite-sized learners

Coupon Code: "survivalguide"

May 21st

Trent Micro-credential Coupon Code CC15



\$495 CAD (Total)

- 6-week intensive self-paced program
- Official University Badge
- **Plus Optional Live weekly coaching to create your own AI Solution! Thurs 5 to 6pm**
- **Best for:** Certification & Custom Solutions

www.SofieAndreou.com

