

Certificate in Applied AI for Social Good

Course 2: AI for operations, admin & planning

When: Monday 9/3/26 - Friday 13/3/2026 (learn at your own pace) + live session on Friday 13 March 13:00 - 14:00 CET

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Syllabus

Course description

This course empowers nonprofit professionals to transform their internal operations using AI tools tailored to their existing digital ecosystems. Whether working with Google Workspace, Microsoft 365, or other platforms, participants will learn to build an integrated AI toolkit that streamlines administrative tasks, enhances team collaboration, and frees up time for mission-critical work.

Using the "organizational house" framework, participants will understand how to layer AI tools from data management (foundation) through to automation (top floor). The course emphasizes practical, immediately applicable solutions for common nonprofit challenges: managing meetings efficiently, processing documents quickly, maintaining donor communications at scale, and tracking organizational data effectively.

Key focus areas include selecting GDPR-compliant tools appropriate for your region and budget, creating sustainable workflows that your entire team can adopt, and

building systems that grow with your organization. By the end, participants will have a clear roadmap for implementing AI tools that respect data privacy, integrate with existing systems, and deliver measurable time savings. The course acknowledges that one size doesn't fit all – every tool shown has alternatives, and participants will learn the principles behind tool selection rather than just specific applications.

AI tools covered in this course

- **Meeting & Collaboration:** NotebookLM, Fireflies.ai, MS Teams transcription, Whisper
- **Document Processing:** NotebookLM, ChatGPT, Claude Projects, MS Copilot, Gemini Gems for document synthesis and annual reports
- **Automation & Workflow:** Google Apps Script, MS Power Automate, Google Sheets automation with AI assistance
- **Communication & Creation:** DeepL for translation, Claude Artifacts & ChatGPT Projects for simple applications

Lessons

Introduction: Building Your AI House

- Overview of the organizational house metaphor (basement to 5th floor)
- Understanding your current digital ecosystem (Google Workspace vs Microsoft 365 vs other)
- Core principles for selecting AI tools: security first, integration second, features third
- Why every tool shown is just an example - finding your alternatives

Lesson 1: Foundation - Data Capture & Meeting Intelligence

- Standard Operating Procedure - your team's "recipe book" for handling data. Creating your 3-step data handling checklist
 - Where we store AI-processed data
 - Who can access it

- When we delete it
- Demo: NotebookLM for transcription and synthesis
- Demo: Creating a simple meeting template
- Alternative tools based on ecosystem (Teams, free Whisper)
- Template: Simple SOP for GDPR compliance

Tutorial: AI and Data: Privacy, Access, and Responsible Processing

This video explains the essentials of data protection and responsible AI use in research contexts. It covers GDPR principles, lawful data access, and how AI tools handle sensitive or open data sources. Participants will better understand how to balance innovation with ethics, using AI to process and analyze data while maintaining the highest possible level of privacy, confidentiality, transparency, and trust. It's a practical guide to avoiding common pitfalls and ensuring data-driven insights stay compliant.

Lesson 2: Document Intelligence - From Chaos to Structure

- Demo: ChatGPT for Annual Report Creation
 - Uploading multiple documents (reports, summaries, impact stories)
 - Prompt sequence: "Analyze these documents and create an outline for our annual report"
 - Iterative refinement
 - Using ChatGPT memory for consistent organizational voice
- Building your prompt library for common documents
- Practical tip: Saving successful prompts as organizational "recipes"

Lesson 3: Smart Automation & Data Management

- **Contact Database Management in Spreadsheets**
 - Creating smart contact databases in Google Sheets/Excel
 - Using AI to clean, organize, and segment contact data

Three Levels of Automation:

- **Level 1:** Google Sheets/Excel Automation
 - Using chatbots to optimize database structure
 - Getting AI to generate formulas for data analysis

- Creating Apps Script with AI assistance
- **Level 2:** Power Automate & Apps Script Workflows
 - Demo: Creating automation flows with AI help
 - Connecting spreadsheet databases to other tools
- **Level 3:** Mini-Apps with AI
 - Quick demo: Claude Artifacts for donation calculators

Choosing your automation comfort zone

Lesson 4: Bringing It Together - Implementation Roadmap

- Demo: AI-Assisted Planning Session
 - Live conversation: "I'm a small nonprofit with 5 staff. Create a 3-month AI implementation plan"
 - Getting ChatGPT to create change management checklist
- Measuring Success Simply:
 - Using free tools for time tracking
 - Demo: "Analyze where we saved time this month" with AI
- Tool Selection Matrix Demo:
 - Live creation: "Compare tools for GDPR, price, ease of use"
- Step-by-step instructions for completing hands-on activities