

TOOLKIT #10

Your AI Co-Pilot

Practical AI for NGO teams: where it helps, ready-to-use prompt cards, how to review what it writes, and the privacy rules that keep your people safe.

A Lever & Core toolkit

Inspired by the human-in-the-loop approach of Ethan Mollick, Co-Intelligence

---

Every complex organization is inherently simple.

01 · WHAT IT IS

An assistant for the first draft, never the final word

General-purpose AI tools can draft a donor letter, summarize a 40-page report or translate an update in seconds. Used well, they give small teams back hours every week. Used carelessly, they invent facts, flatten your voice and put personal data at risk.

What it is

A simple way of working with AI as a co-pilot: you brief it like a capable new colleague, it produces drafts and options, and a person checks, corrects and owns the result. This toolkit gives your team that loop, four prompt cards for everyday NGO work, and a short set of responsible-use rules.

It works with any general-purpose AI assistant your organization has approved, including the ones built into common email and office software.

Source thinking. The approach draws on Ethan Mollick's book *Co-Intelligence* (2024): bring AI into real tasks to learn what it can do, give it a clear role and context, keep a human in the loop, and expect the tools to keep improving. Mollick also describes the "jagged frontier": AI is strong at some tasks and unreliable at others that look similar. This toolkit is Lever & Core's own adaptation for NGO teams.

Where to use it

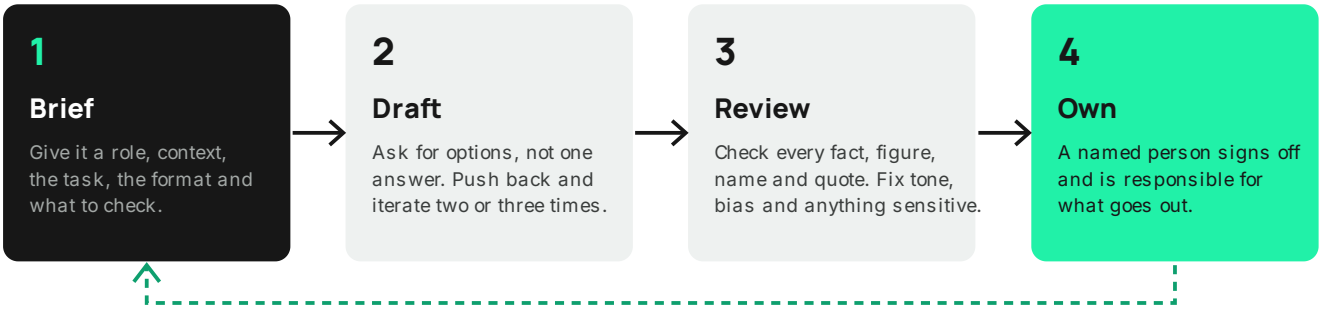
GO use freely	Brainstorming, outlines, rewriting for tone or length, summarizing public documents, first drafts of social posts, meeting agendas.
REVIEW use with checks	Donor letters, grant and impact reports, translations, data summaries, policies. A person checks every fact and signs off.
STOP don't use it	Personal or case data in unapproved tools, decisions about people (hiring, eligibility, safeguarding), invented figures or quotes, images presented as real beneficiaries.

You need: one approved AI tool, one recurring writing task to start with, 30 minutes to try the loop, and a named reviewer.

02 · THE FRAMEWORK

Brief, draft, review, own

THE CO-PILOT LOOP: AI DRAFTS, PEOPLE DECIDE



THE HUMAN STAYS IN THE LOOP AI is a fast, tireless assistant that is sometimes confidently wrong.

The five-part brief

Most weak AI output comes from a weak brief. Cover these five parts and quality rises sharply.

Role
Who should it act as? "An experienced NGO fundraiser."

Context
Who you are, who it's for, what they already know.

Task
Exactly what to produce, with your real facts pasted in.

Format
Length, tone, structure, language, reading level.

Check
Ask it to flag assumptions and anything it isn't sure of.

What it does well

- Turning notes into a clean first draft
- Offering several versions to choose from
- Shortening, simplifying, changing tone
- Summarizing long documents you provide
- Rough translations for a fluent person to polish

Where it fails

- Facts, figures and names it wasn't given
- Sources and quotes, which it may invent
- Your organization's real voice and history
- Judgment about people and sensitive cases
- Knowing when it is wrong

03 · STEP BY STEP

Bring AI into one task this week

1

Pick one recurring task

Choose something your team writes again and again: the monthly donor update, meeting summaries, thank-you letters, social posts. Start small and visible.

2

Clean the input

Remove names, contact details, health, case or financial information about individuals before pasting anything in, unless your organization has approved the tool for that data.

Ask: Would we be comfortable if this text were read by someone outside the organization?

3

Write the five-part brief

Role, context, task, format, check. Use the prompt cards on page 6 as a starting point and paste in your own facts.

4

Ask for options and push back

Request two or three versions. Tell it what to change: “warmer”, “shorter”, “less jargon”, “add the point about volunteers”. Treat it as a conversation.

5

Review like an editor

Check every fact, figure, date, name and quote against your own records. Read it aloud for tone. Remove anything you can’t verify.

6

Own it

A named person approves what goes out. Be open about AI use where it matters to your donors, partners or funders, and follow any rules they set.

7

Save what works

Keep good briefs in a shared team library with a note on when to use them. Review the library and your rules every few months as the tools change.

> **Timing.** A first try takes about 30 minutes. Give the team two or three weeks on one task before adding a second.

04 · WORKED EXAMPLE

The quarterly donor update, in two languages

TYPICAL SCENARIO

A composite situation of the kind we often see in the sector. It is not a client and does not describe any real organization.

THE SITUATION

A small NGO running after-school programs sends a quarterly update to its donors in two languages. The communications officer usually spends two days on it: chasing notes from program staff, writing, then waiting for a volunteer translator.

1 · CLEAN

Program notes are pasted into the organization's approved AI tool with children's names, schools and family details removed. Figures come only from the program's own records.

2 · BRIEF

Role: an experienced NGO communications writer. **Context:** our donors are mostly long-term individual supporters; they like stories and plain language. **Task:** turn the notes below into a 400-word update with one short story, three highlights and a thank-you. Use only the facts given. **Format:** warm, simple, no jargon, short paragraphs. **Check:** list any claim you weren't sure about.

3 · DRAFT

Two versions come back. The officer picks the second, asks for a warmer opening and a shorter story, and gets a revised draft.

4 · REVIEW

The program manager checks every figure. One activity the AI described more broadly than the notes allowed is corrected. The story is checked so that no child can be identified.

5 · TRANSLATE

The AI produces the second-language draft. A fluent volunteer reviews it for meaning and tone instead of translating from scratch.

6 · OWN

The director approves both versions. The brief is saved in the team library as "Quarterly donor update".

What changed. Staff time moved from blank-page writing to checking and improving. The update stayed accurate and personal because people controlled the facts and had the final say.

The same loop works for meeting summaries, grant-report sections, volunteer briefings and social posts. Start with the task that costs your team the most writing time.

05 · PROMPT CARDS

Four prompt cards to adapt and reuse

Fill in the blanks, paste in your own facts, and keep the last line of each card: it asks the AI to show where it is unsure. Print this page and keep it next to your desk.

A · DONOR THANK-YOU LETTER

Review level: a person checks every fact and personal detail

Act as an experienced NGO fundraiser. Write a thank-you letter to donor type who gave to program.

Mention what the gift makes possible, using only these facts: facts.

Tone: warm and personal, length words, no jargon, in language.

Give me two versions, and list anything you assumed.

B · REPORT SECTION

Review level: figures checked against your records

Act as a grant-report writer. Turn the notes below into the section section for funder type.

Structure: what we planned, what we did, what we learned, what comes next.

Use only the facts and figures in the notes. Do not add numbers.

Flag any sentence that goes beyond the notes.

C · SUMMARY FOR A BUSY READER

Review level: check against the original document

Summarize the document below for audience who has two minutes.

Give: the main point in one sentence, three key facts, any decision needed, and any deadlines.

Quote numbers exactly as they appear. Keep it under words words.

Tell me which parts of the document you left out.

D · TRANSLATION DRAFT

Review level: a fluent speaker reviews before it goes out

Translate the text below from language into language for audience.

Keep the meaning and warmth. Prefer natural phrasing to word-for-word.

Keep names, figures and program names unchanged.

List any phrases that were hard to translate or could be misread.

+ OUR OWN PROMPT CARD

Task	Approved tool	Reviewer

06 · FOR THE FACILITATOR

Tips, mistakes and responsible-use rules

Facilitator tips

Practise on real work

Use a task the team actually has this week. Results on real work convince people more than any demo.

Show the failures too

Let the group catch an invented fact. It is the fastest way to build healthy review habits.

Start with the most sceptical person

Their questions shape better rules, and their support matters most.

Keep your voice

Paste in two or three past texts you are proud of and ask the AI to match their style.

Common mistakes

Copy, paste, send

Publishing a draft without review is how invented figures reach donors.

Vague one-line prompts

“Write a donor letter” gets a generic letter. Brief it properly.

Pasting personal data

Once it is in an unapproved tool, you can’t take it back.

Giving up after one try

The first answer is rarely the best. Iterate two or three times.

Our responsible-use and privacy rules

- Use only AI tools the organization has approved, with organizational accounts.
- Never paste personal, health, case or financial data about beneficiaries, donors or staff into unapproved tools.
- Follow your data-protection law and your funders’ rules on AI use.
- Turn off the use of your data for model training where the tool allows it.
- A person checks every fact, figure, name and quote before anything goes out.
- AI never makes decisions about people: hiring, eligibility, safeguarding.
- No AI-generated images presented as real beneficiaries or events.
- Be open about AI use where it matters, and name an owner for these rules.

Want help running this with your team?

Lever & Core — Uriel Edery

We help NGOs and mission-driven organizations find the few things that really limit their impact, and build simple, focused ways of working around them.

[website] [email]

THE LEVER & CORE TOOLKIT SERIES

01 The Evaporating Cloud
02 Find Your One Constraint
03 The Root of Recurring Problems
04 The Strategy Kernel
05 Why & Where We Win
06 The Trusted Advisor Meeting
07 The One-Page Board Memo
08 Negotiate on Interests
09 Checklists That Work
10 Your AI Co-Pilot

This toolkit is an independent, original adaptation by Lever & Core for mission-driven organizations. The methods it builds on are credited to their authors; it is not affiliated with or endorsed by them. Free to print and use inside your organization.