

This webinar will begin shortly

'AI for nonprofits – transforming financial  
management in an era of uncertainty'

11 December 2025

13.00-13:45

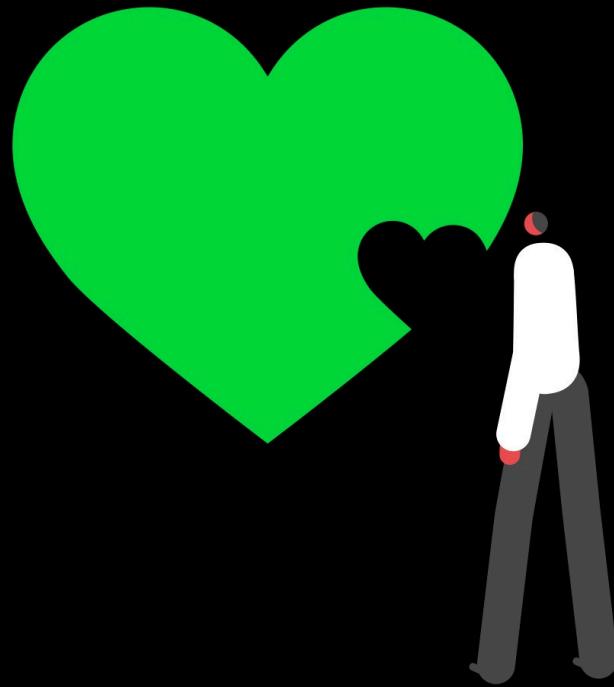
# AI for nonprofits –transforming financial management in an era of uncertainty



Hobby Dean

NFP Senior Solution Consultant

Sage Intacct



# Agenda

- **Why AI matters now for non-profit finance teams**
- **How AI improves accuracy, transparency, and decision-making**

## **Demonstration of AI and automation within Sage**

- **Intacct**

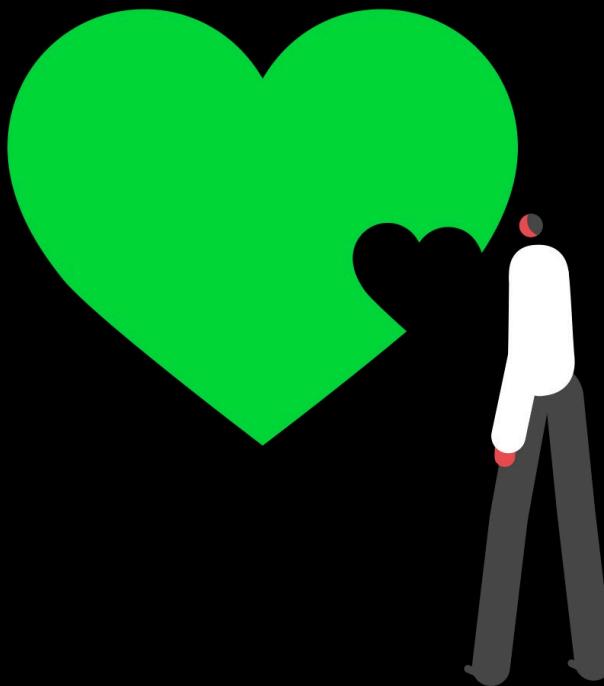
# Why AI matters now for non-profit finance teams



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# 2023 -Future using AI tools such as ChatGPT

- First and foremost everyone's role is safe
- Key to data analysis is to use the right prompt with GPT tools

Examples

- Understand potential donors/funders/sponsors
- More analysis on less data -extrapolate in multiple ways in less time
- Help evaluate fund raising ideas

...and so much more



# AI is becoming more valuable in NFP

- **Lack of Funding**
- **Lack of Resources**
- **Increased Responsibility**
- **Some areas require you to do research**
- **Keeping a finger on the pulse**

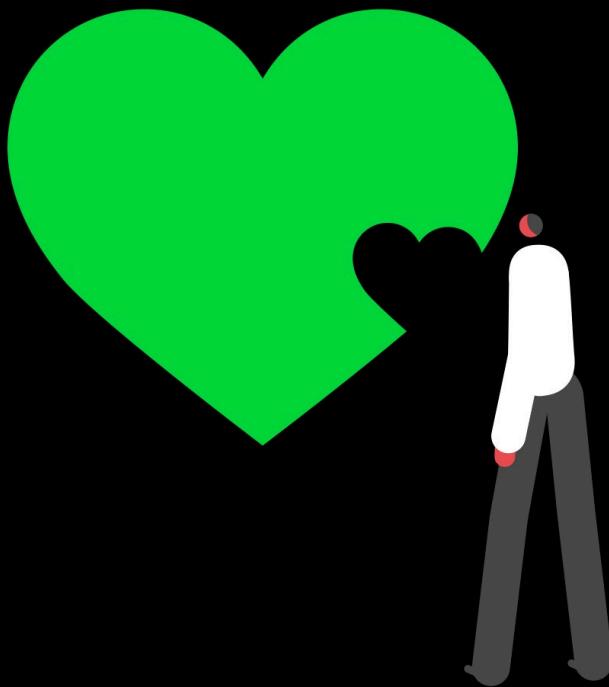
# How AI improves accuracy, transparency, and decision-making



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# Examples of how AI can help Finance Teams

## How can AI help with uncertainty?

AI can help nonprofits strengthen, streamline, and manage important ways—especially when budgets are tight and unpredictable. Here's a clear breakdown of the benefits:

### 1. Automating Routine, Time-Consuming Tasks

Nonprofits often operate with lean teams. AI can help with:

- Invoice processing and approvals
- Expense categorization and reimbursement validation
- Data entry from receipts, forms, and bank transactions
- Donor record updates and reconciliation

**Benefit:** Staff can redirect time toward mission-critical work.

### 2. Enhancing Budgeting and Forecasting

AI can analyze historical financial data, program costs, and other factors to:

- Predict revenue fluctuations (e.g., grants, donor support)
- Estimate program expenses more accurately
- Identify cost overruns early
- Model different budget scenarios ("What if" analysis)

**Benefit:** Leadership gets real-time insights to adapt quickly.

### 3. Improving Grant Management

AI tools can scan grant requirements, track compliance data. They can:

- Ensure spending aligns with funder requirements
- Flag potential compliance risks
- Organize documents for audits
- Summarize complex financial reports

**Benefit:** Fewer compliance errors and faster reporting.

### 4. Strengthening Donor Insights

AI can analyze donor behavior to:

- Identify which supporters are most likely to give
- Suggest personalized outreach messages
- Predict which fundraising campaigns will be most successful
- Analyze economic conditions affecting giving

**Benefit:** More resilient, data-driven fundraising.

### 5. Risk Monitoring and Fraud Detection

AI can monitor financial activity in real time to:

- Detect anomalies or unusual spending patterns
- Flag potential fraud or cybersecurity threats
- Alert staff about cash-flow risks before they happen

**Benefit:** Better protection for the organization.

## In Summary

AI gives nonprofits the tools to:

- ✓ Do more with fewer resources
- ✓ Make smarter, faster decisions
- ✓ Predict financial risks before they hit
- ✓ Strengthen fundraising and reporting
- ✓ Increase transparency and accountability

If you'd like, I can also create:

- 📄 A full article or blog post
- 📊 A presentation or slide deck
- 🌟 Scenario examples for nonprofit leaders
- ⌚ A tailored AI-adoption roadmap for nonprofits

Just tell me what you need!



Do you like this personality?

# Be mindful of ...



WHAT TOOLS ARE  
YOU USING ?



WHAT IS YOUR  
DATASOURCE(S)?



HOW ACCURATE IS  
YOUR DATA?



HOW YOU ASK THE  
QUESTION ?

# Sage Ai

## Boost efficiency, save time

### AP Automation\*

Available

Uses AI to streamline vendor invoice processing. It automatically creates draft bills, matches them to purchasing transactions, reduces manual entry, and improves accuracy.

### Intelligent Time\*

Available

Uses AI to suggest timesheet entries based on calendar, email, and app activity, making time tracking faster and more accurate.

## Spot opportunities and problems early

### Outlier Detection

Available

Flags unusual journal entries in real time, helping approvers spot potential errors by comparing new entries against historical patterns.

### Cash Prediction & Optimization\*

Coming Soon

Forecast short-term cash flow and suggest actions to improve liquidity, helping finance teams manage cash more accurately and proactively.

## Get instant answers

### Search Help

Available in English-speaking geos

Providing users with direct, conversational answers to product or help related questions

### Advanced Search\*

Coming soon

Makes it easy to ask plain-language questions and instantly find answers across your financial data

## Smoothen, faster close

### Close Automation\*

Phased launch

Streamlines and accelerates the month-end close by tracking tasks, flagging issues, and guiding teams through each step – reducing manual effort and helping you close faster with confidence.

\* Additional subscription required

# Sage Intacct demo.

# Sage is the leader in Finance AI and Automation.

No other provider automates more, with more accuracy, than Sage

Sage Ai  
in the last  
12 months:  
**3.2b+**  
transactions  
processed

**45m+**  
invoices  
automated

**190m+**  
anomalies  
flagged

**96%**  
data  
accuracy

**50m+**  
estimated admin  
hours saved

## Native Ai

embedded into workflows,  
working securely with your  
permission

## Accurate Ai

designed by Finance  
Professionals, trained 7+  
years with real data

## Authentic Ai

you are always in control of  
what Ai does for you, and what  
is posted to your ledgers

Sage Ai is real(not hype), proventechnology you can trust

Sage

# Summary

- **NFP organisations can benefit from AI on many levels - transparency, accountability and governance**
- **Different solutions will offer different capabilities**
- **Landscape will change rapidly**
- **Always fact check/verify**



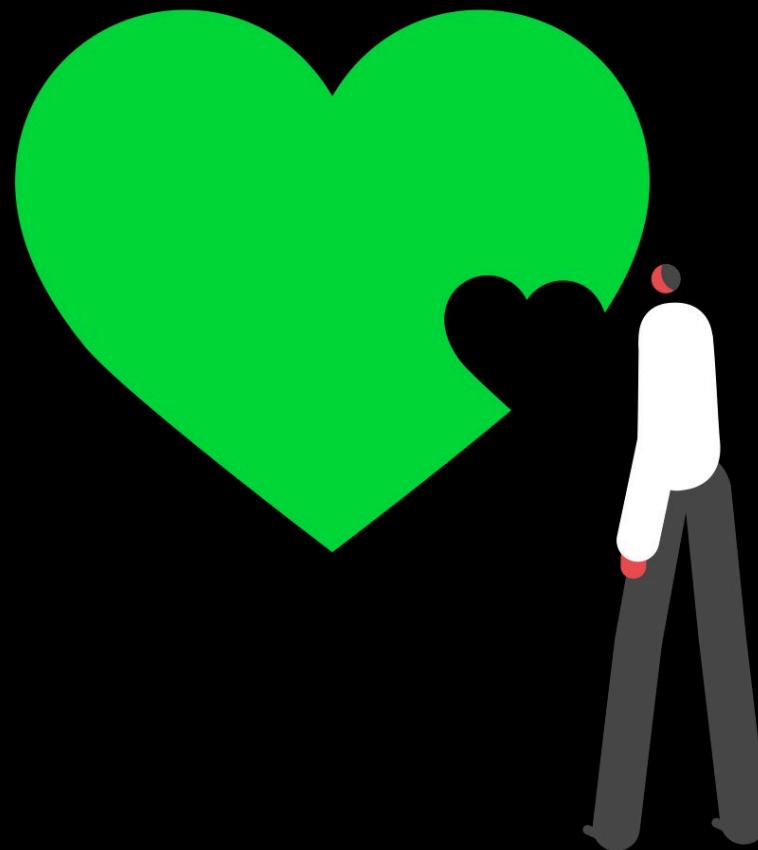
# For more Information



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# Q & A



Thank you for joining us!