



# Complete AI Demo Guide for Movement Organizations

Your Step-by-Step Guide to Exploring Human-AI Partnerships

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## Welcome to Your Demo Experience

These demonstrations show how AI can amplify your organization's impact while keeping your values and data under your control. I use sample data from a fictional social justice organization to show real capabilities without compromising anyone's privacy.

**What makes this different?** This isn't about replacing human judgment or community relationships. It's about giving you powerful tools to spend less time wrestling with spreadsheets and more time building the world we need.

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## Quick Start: What You Need to Know

### Getting In

- **Website:** <https://luisconsults.com/?demo=preview>
- **Password:** [Provided by Luis]
- **Time needed:** 1 hour per demo
- **Data:** All fictional but realistic

### What We're Testing

I've built three AI assistants that work with your organization's information:

1. **Financial Intelligence** - Makes budget planning accessible to everyone
  2. **Knowledge Management** - Preserves organizing wisdom across staff changes
  3. **Impact Storytelling** - Connects data with human stories powerfully
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## Demo 1: Financial Intelligence Co-Pilot

"Finally, budgets that make sense to program people"

### What This Does

Translates between money language and mission language. Whether you're a community organizer wondering about program costs or a development director modeling funding scenarios, this AI speaks your language.

### Key Capabilities

- **Budget Translation:** "Explain our Q3 finances like I'm a new board member"
- **Scenario Planning:** "What happens if we lose the Ford Foundation grant?"
- **Grant Strategy:** "Which proposals have the most restrictions?"
- **Program Costs:** "What's the real cost per person we serve?"

## 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?"

## What Good Responses Look Like

- ✓ **Clear sourcing:** "According to the Q3 Financial Report..."
  - ✓ **Shows the math:** "Total expenses (\$461,800) divided by clients served (342) = \$1,349 per client"
  - ✓ **Accessible language:** Uses terms your team actually uses
  - ✓ **Honest about limits:** Says when information isn't available
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## Demo 2: Knowledge Management Assistant

"Institutional memory that doesn't walk out the door"

### What This Does

Captures and shares the organizing wisdom your organization has built. When someone asks "How did we win that housing campaign?" or "Who are our best media contacts?", this AI has the answers.

### Key Capabilities

- **Campaign History:** Learn from past victories and challenges
- **Partner Intelligence:** Maintain relationships across staff transitions
- **Tactical Knowledge:** Share what works in your community
- **Best Practices:** Connect current challenges to proven solutions

## 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?"
- "When is the best time for door-knocking in our community?"
- "What makes a successful tenant organizing campaign?"

- "Tell me about our relationship with Unidos Legal Services"

### Why This Matters

Every time someone leaves your organization, they take knowledge with them. This system helps ensure that hard-won lessons, key relationships, and effective strategies stay with your community.

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## Demo 3: Impact Storytelling Engine

"Your data and stories, working together"

### What This Does

Weaves together your numbers and narratives to show the full picture of your impact. Perfect for funders who need data, community members who connect with stories, and board members who want both.

### Key Capabilities

- **Story + Data Integration:** Connect human experiences with measurable outcomes
- **Audience-Specific Reports:** Same impact, different framings for different people
- **Ripple Effect Analysis:** Show how individual changes create community transformation
- **Compelling Narratives:** Generate powerful content 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?"
  - "What patterns do you see across our success stories?"
  - "How does Maria's story connect to our broader housing work?"
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## How to Evaluate What You See

### What Makes a Good AI Response

- **Accuracy:** Information matches the source documents
- **Relevance:** Directly answers your question
- **Context:** Includes background that helps you understand
- **Accessibility:** Uses language appropriate to your role
- **Actionability:** Suggests next steps when helpful

### Red Flags to Watch For

- ▶ **Vague sourcing:** "Based on the data..." (instead of naming specific documents)
- ▶ **Inconsistent numbers:** Different totals for the same question
- ▶ **Made-up details:** Claims without clear source references
- ▶ **Math errors:** Calculations that don't add up when you check

## Quick Verification Tricks

1. **Ask for sources:** "What document did you get that from?"
  2. **Test calculations:** "Show me how you calculated that"
  3. **Check consistency:** Ask the same question different ways
  4. **Cross-reference:** Ask related questions that should align
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## Verified Facts for Testing

Use these to check if the AI is accurate

### Financial Overview (2024)

- **Total Budget:** \$2,078,000
- **YTD Actual (Q1-Q3):** \$1,517,300
- **Q3 Expenses:** \$461,800 (Per Q3 Financial Report)
- **Cash Reserves:** \$789,000 (4.2 months)

### Program Impact (YTD 2024)

- **Total People Served:** 1,847
- **Legal Aid:** 743 clients
- **Tenant Organizing:** 456 participants
- **Youth Programs:** 342 participants
- **Policy Advocacy:** 306 participants

### Key Outcomes

- **Evictions Prevented:** 143
- **Housing Units Preserved:** 287
- **Benefits Secured:** \$2,437,500
- **Policy Victories:** 3 ordinances
- **Cost per Client:** \$1,349

### Major Active Grants

- Ford Foundation - \$250,000 (Ends 12/31/24)
- MacArthur Foundation - \$200,000 (Ends 6/30/25)
- State Justice Fund - \$150,000 (Ends 2/28/25)
- Community Foundation - \$100,000 (Ends 12/31/24)
- Anonymous Donor - \$75,000 (Ends 12/31/24)

### Grant Pipeline (2025-2027)

- **Total Pipeline:** \$1,905,000
  - Housing Justice Initiative: \$485,000
  - Youth Leadership Institute: \$320,000
  - Community Power Building: \$750,000
  - Emergency Response Fund: \$150,000
  - Capacity Building Grant: \$200,000
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## Demo Success Tips

## Before You Start

1. **Think about your pain points:** What information is hard to find now?
2. **Identify key decisions:** What choices do you need to make soon?
3. **Consider your team:** Who struggles most with current systems?

## During the Demo

1. **Start simple:** Begin with basic questions to get comfortable
2. **Build complexity:** Move to more challenging scenarios
3. **Test limits:** Push boundaries to see what it can and can't do
4. **Take notes:** Document what would be most helpful

## Questions to Ask Yourself

- 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?
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## What the AI Can and Cannot Do

### What It CAN Do

- ✓ Analyze complex budget scenarios quickly
- ✓ Find patterns across multiple data sources
- ✓ Translate technical information into accessible language
- ✓ Maintain institutional memory across staff transitions
- ✓ Generate reports tailored to different audiences

### What It 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)
  - ✗ Understand local context without your input
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## Data Security & Privacy

### In These Demos

- All data is fictional - no real client or organizational information
- Your questions aren't stored permanently
- Each session is isolated and expires
- No personal information is collected

## **In Real Implementation**

- Your data stays under your control
- AI processes information without storing it elsewhere
- You decide what information the AI can access
- Full audit trails show how information is used

## **Troubleshooting Common Issues**

### **If the AI Seems Wrong**

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

### **If You Get Stuck**

- Type "help" for guidance
  - Ask "what can you do?" for suggestions
  - Refresh the page to start over
  - Take a screenshot and ask Luis
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## **After Your Demo: Next Steps**

### **Discuss with Your Team**

- What excited you most?
- What concerns need addressing?
- How would this fit your workflow?
- Who would be the primary users?

### **Identify Priority Use Cases**

- Which demo addresses your biggest pain point?
- What would create the most immediate value?
- Where would you want to start?

### **Consider Implementation**

- What data do you already have organized?
- What training would your team need?
- How does this fit your budget planning?

### **Questions for Luis**

- 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?
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## Quick Reference

### 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..."

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## Remember: This Is About Your Mission

These tools aren't about replacing the relationships and community knowledge that make your work powerful. They're about freeing up your time and energy so you can focus on what matters most: building movements, serving community members, and creating the change our world needs.

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**Questions or technical issues?** Contact Luis

**Demo Version:** 1.1 | **Last Updated:** March 2025

For verification purposes only | All data is fictional