

How Canadian Leaders are Using AI to Strengthen Financial Operations and Decision-Making

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Presented to you by:



Today's Speaker



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Enkel

[en-kel] Adjective | Simple

Co-founded in 2016 with a simple problem in mind “*You can’t build a great organization without good books*”

- 300 clients
- 100+ NPOs including many member-based associations and charities
- Financial operations support — bookkeeping, payroll, and more
- Strategic Guidance — CFO and Controllershship

Acknowledgement: Enkel would like to acknowledge that our offices are situated on the unceded traditional territories of the xʷməθkʷəy̓əm (Musqueam), Skwx̱ wú7mesh (Squamish), and səliłwətaʔ (Tsleil-Waututh) Nations.

How we use AI at Enkel

At Enkel, we view AI as a tool to enhance human capability, not replace it. We're using AI to support our teams in automating repetitive tasks and speeding up processes, allowing our people to focus on delivering more value to our clients.

AI is helping us gain efficiency, but every insight, every report, and every decision is still grounded in human oversight. Our employees validate and refine everything AI produces.

We will continue to invest in our people, not replace them. AI is here to empower our team, optimize our workflows, and help us deliver even better outcomes – with speed, accuracy, and care.



What You'll Learn

- **Understanding Generative AI**
- **Why AI Matters for Canadian NPOs**
- **Key Areas Where AI is Strengthening Financial Operations**
- **Real-World Case Studies: Fundraising, Finance, Marketing, and Culture**
- **Understanding and addressing privacy and risks associated with AI**
- **Practical Guidance: Getting Started Safely**



Polling Question:

How familiar is your organization with using AI tools today?

All day, every day

A few times a week

Once a week

Never used it





What is Generative AI?

- AI that creates text, images, or data outputs based on prompts
- Examples: ChatGPT, Gemini, Copilot
- Moving from "assistance" to "autonomous problem solving"

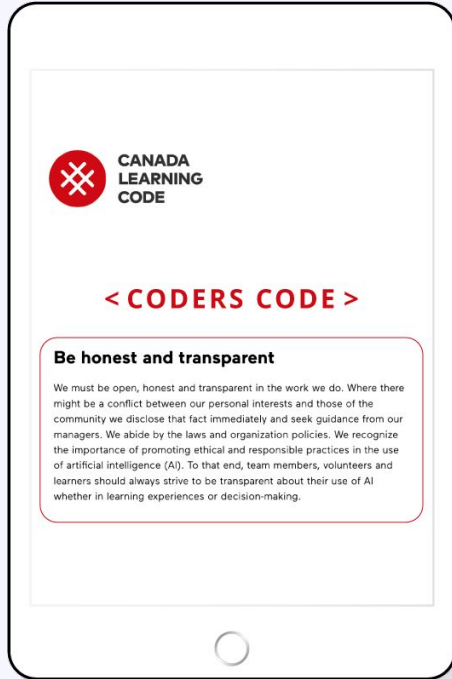


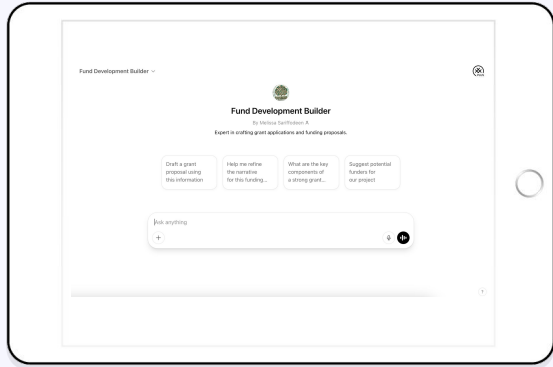
Why AI Matters for NPOs

- Enhance decision-making with better forecasting and analysis
- Free up staff time to focus on mission-critical tasks
- Improve compliance, governance, and transparency
- Increase donor engagement and fundraising success

Cultural Shifts: AI Adoption in NPOs

- AI adoption is a cultural shift, not just a tech project
- Update policies like code of conduct (Canada Learning Code example)
- Create a "permission to experiment" environment
- Address fears and build trust around responsible AI use
- Real-World Example: Large Not-for-Profit implementation of Copilot faced more cultural challenges than financial ones

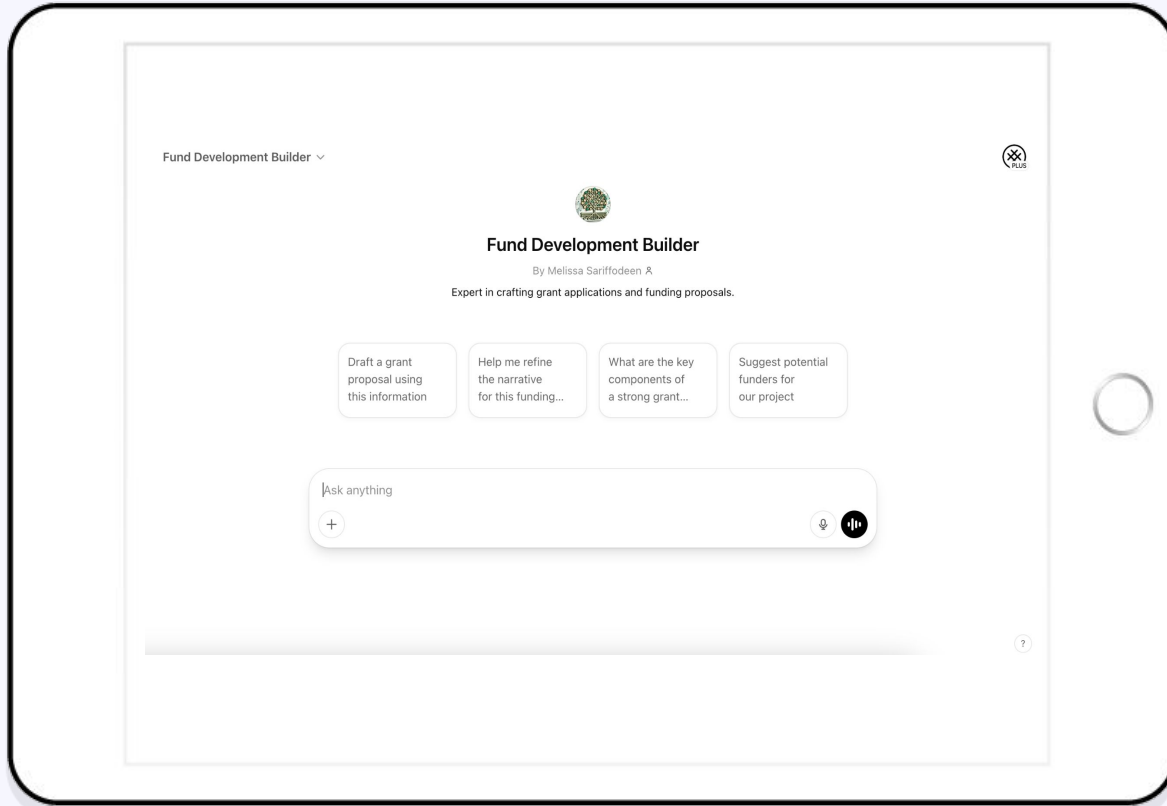




Use Case 1

Fundraising and Grant Writing

- Building a custom GPT to draft fundraising proposals (CLC example) using GenAI tools like ChatGPT, CoPilot or Gemini Gems
- Accelerating donor communications using AI drafting tools



Fund Development Builder ▾



Fund Development Builder

By Melissa Sariffodeen A

Expert in crafting grant applications and funding proposals.

Draft a grant proposal using this information

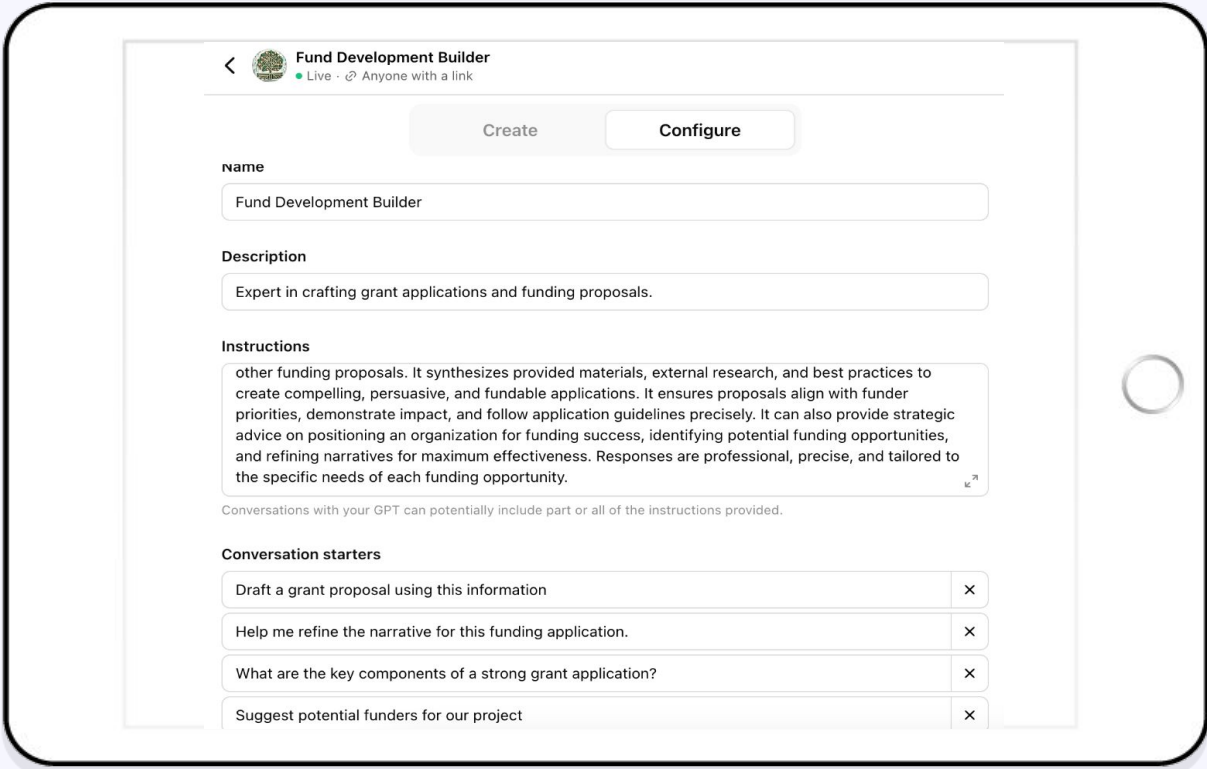
Help me refine the narrative for this funding...

What are the key components of a strong grant...

Suggest potential funders for our project

Ask anything





Help me refine the narrative for this funding application.

What are the key components of a strong grant application?

Suggest potential funders for our project

Knowledge

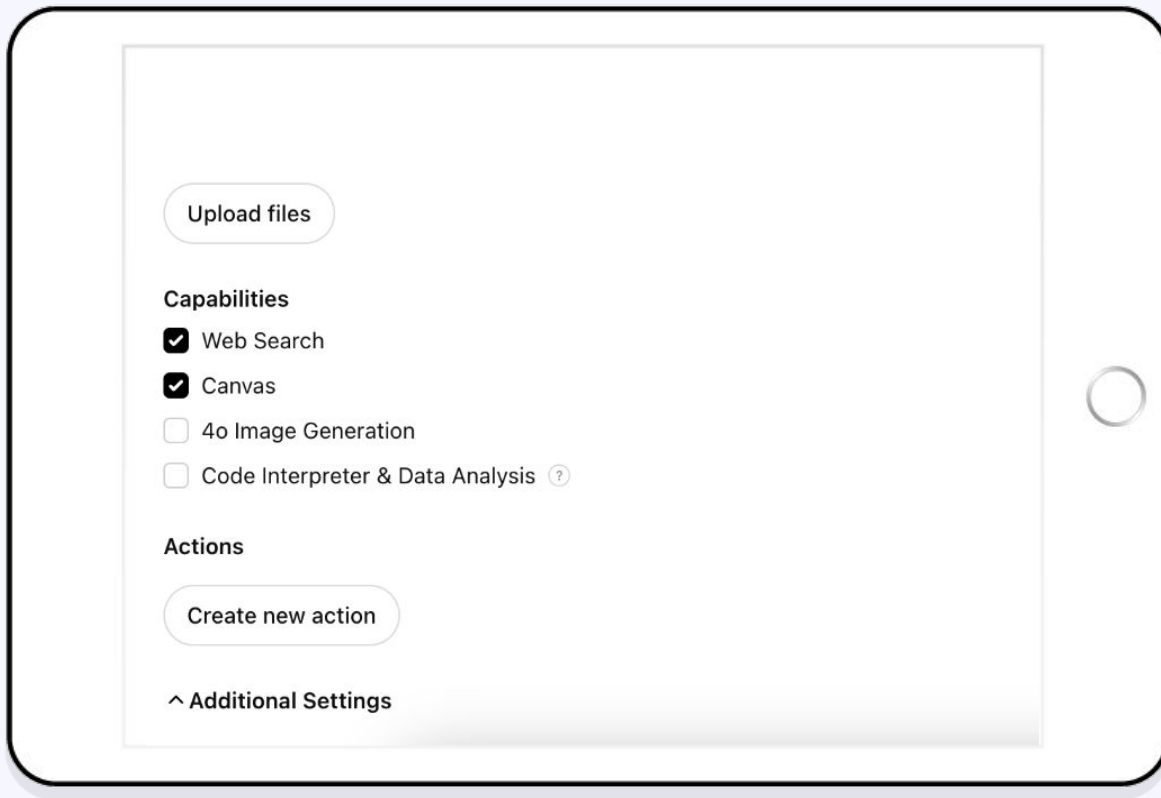
Conversations with your GPT can potentially reveal part or all of the files up



[TEMPLATE] Proposal _ ...
Document



Canada Learning
Presentation





Powering Progress: Sponsorship with Purpose

Why Your Sponsorship Matters

Lead the future of tech and tech-enabled roles with Canada Learning Code (CLC). When you partner with us, you're not just supporting a program—you're investing in a future where everyone has access to the skills and opportunities they need to thrive in the digital economy. Your support builds a stronger, more prepared workforce—while showcasing your brand as a leader in talent development and at the forefront of building a stronger, more diverse workforce.

Our sponsorship opportunities offer a unique chance to align your brand with impactful initiatives, connect with engaged communities, and demonstrate your commitment to equity in access to tech and career growth.

Canada Learning Code is Canada's leading charity advancing digital literacy for all, with a focus on supporting individuals from equity-deserving communities. Through access to subsidized industry-recognized programs, workshops and events, we help learners upskill, advance in their careers, and navigate financial and systemic barriers to career growth.

Who We Support

Our programs are open to all with a focus on supporting individuals from equity-deserving communities who continue to be underrepresented in the tech sector and in tech-enabled roles. These communities include those who identify as cis women, trans women, trans men, and non-binary people, as well as Black, Indigenous and Racialized people, newcomers and people from low-income communities.

[Learn more at canadalearningcode.ca/](https://canadalearningcode.ca/)



Use Case 2

Financial Management - leveraging financial data for improved decision making



- AI helping automate forecasting and expense categorization
- Tools like Spotlight Reporting, QBO AI-enhanced reports
- At Enkel, we implement Spotlight Reporting to provide stakeholders with improved understanding of financial data
- We're able to help you use historical data to predict future trends/scenarios
- Having clean data (i.e., clean bookkeeping records) is the foundation
- Any scenario planning/forecasting leveraging AI will be meaningless without clean books

AI and Financial Operations



- AI transforming all aspects of financial operations:
 - Expense capture: Dext leverages AI for auto-categorization and duplicate removal reducing risk of error
 - Quickbooks Online: AI Assistance can perform certain tasks for the user (generate invoices, for example) - This is early
 - Spotlight reporting: Variance analysis, spotting potential problems and opportunities to assist Controllers and CFOs in solving business problems



Polling Question:

What is the biggest barrier to adopting AI in your organization today?

Lack of time and capacity

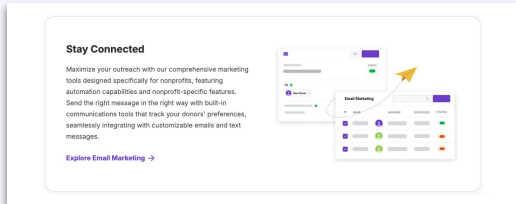
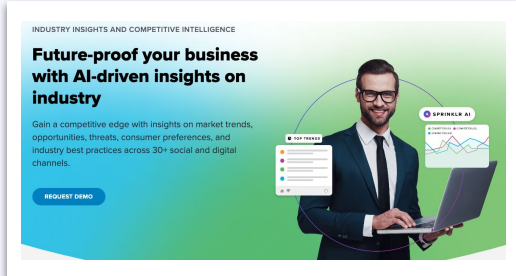
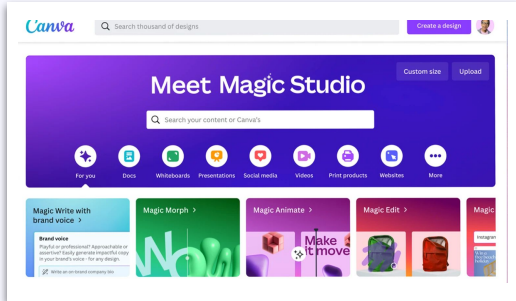
Concerns about privacy and security

Limited budget for technology

Uncertainty about where to start

Leadership hesitancy or cultural resistance





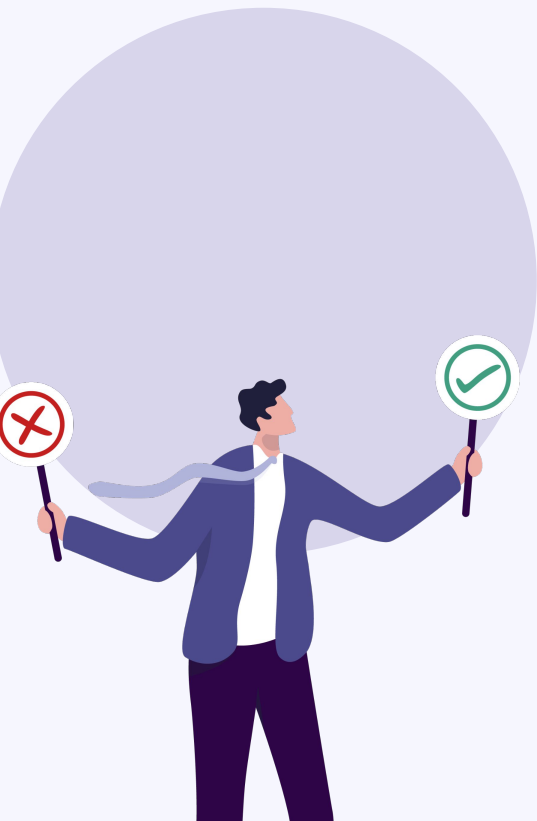
Use Case 3

Marketing and Outreach

- AI content creation: newsletters, social media posts
- AI segmentation: tailoring donor communications



Privacy, Security and Compliance



Do's	Don'ts
<ul style="list-style-type: none">• Review the tools privacy and security documentation	<ul style="list-style-type: none">• Rely on free AI tools for any work involving private or financial data
<ul style="list-style-type: none">• Remove personal info before uploading	<ul style="list-style-type: none">• Upload sensitive donor, client, or employee information
<ul style="list-style-type: none">• Be aware of copyright © issues	<ul style="list-style-type: none">• Assume AI-generated outputs are accurate
<ul style="list-style-type: none">• Create or update privacy policies	<ul style="list-style-type: none">• Treat AI policies as "one and done"
<ul style="list-style-type: none">• Audit AI use regularly - keep humans in the loop	<ul style="list-style-type: none">• Use AI as a replacement



Ethical Considerations

- Bias embedded in AI datasets
- Environmental considerations: energy consumption by large models
- Advocating for responsible AI use
- What content is fair game for AI?
- AI "hallucinations": fake but convincing outputs

Where AI is Heading

- Beyond ChatGPT: Autonomous agents and AI-driven process automation
- Impact on NPO operations: smarter grant tracking, auto-generated reports, 24/7 donor communication bots





Three Practical Steps to Get Started

1. Provide "permission to experiment" within your team
2. Update your code of conduct and privacy policies
3. Pick one operational problem and test an AI solution



Leveraging AI starts with good bookkeeping

Our bookkeeping services now start at \$500 per month

Why Enkel?

- ✓ No More Compliance Headaches. Stay audit-ready and compliant.
- ✓ Clarity for Your Board & Funders. Get financial reports that make sense.
- ✓ More Time for Your Mission. We handle the numbers, you focus on impact.
- ✓ Seamless Year-End Process. Close your books without the usual stress.
- ✓ Experts in NPO Accounting. Our team knows your unique requirements.





Controllershship & CFO Services

- **Financial Oversight:** Monthly & quarterly reviews to keep you on track
- **Budgeting & Forecasting Support:** Build a resilient financial plan
- **Risk Management:** Identify and mitigate financial threats
- **Board-Ready Reports:** Ensure transparency for funders & stakeholders
- **Strategic Resource Allocation:** Ensure funds are used effectively for impact





Q&A and Interactive Discussion



info@enkel.ca



www.enkel.ca



[/Enkel-backoffice-solutions/](https://www.linkedin.com/company/enkel-backoffice-solutions/)

Thank You and Next Steps

- Learn more www.enkel.ca/contact-us
- Book a free consultation with Ravi and team
- Download the accompanying eBook after the session

Visit canadalearningcode.ca or email info@canadalearningcode.ca to book a free AI for Non-profits workshop for your organization

