

The background of the slide is a dark, slightly blurred photograph of a modern office interior. It shows glass-walled rooms and people working at desks. The lighting is dim, creating a professional and focused atmosphere. There are also some abstract white and orange lines overlaid on the image, resembling stylized paths or data lines.

Donor Love, Not Data Entry: *Agentic AI in Action*

DECEMBER 4, 2025

Today's *Presenters*



Stacie Cornwell
Partner
Industry Leader, Nonprofit

Stacie is the leader of Armanino's National Nonprofit & Education Industry. Stacie leads a nationwide team at Armanino to determine the needs of the Nonprofit Sector and set industry strategy around those needs.

Stacie is also a financial statement auditor and specializes in serving nonprofit organizations and higher education. She also provides specialized expertise on complex accounting issues, including revenue recognition, board governance and benchmarks for financial performance.



Lauren E. Nelson
Director
Automation & AI

Lauren is an innovative technology leader with 7+ years of experience driving automation and AI initiatives across diverse industries. She blends strategic vision with hands-on execution to optimize operations, enhance decision-making and accelerate innovation. With a proven track record of building sustainable, scalable AI roadmaps—from early brainstorming and use-case development through rollout and adoption—she excels at translating complex AI concepts into clear, actionable deliverables. Lauren is a Certified Scrum Master and a Penn State Engineering alumna.



Brenda Kahler
Senior Director
Technology, Sage Intacct

Brenda Kahler serves as a director at Armanino, where she leads our nonprofit client engagement team. Her 20+ years of nonprofit accounting experience include roles at

Big 4 public accounting firms and as an in-house controller, giving her a well-rounded perspective on sector challenges and best practices. At Armanino, she has been involved in more than 200 nonprofit technology implementations and assessments. Brenda is a licensed CPA and CGMA with extensive knowledge of nonprofit compliance requirements and is a frequent speaker on trends shaping the nonprofit landscape.

WHO WE ARE

Firm Overview



Employees
2700+

Team Members in
41 States

Firm Ranking
20th Largest

Canada
Vancouver

India
Ahmedabad
Hyderabad

California San Ramon Century City El Segundo Irvine Los Angeles San Francisco San Jose Woodland Hills	Florida Boca Raton	Missouri St. Louis St. Charles	Tennessee Nashville
Colorado Denver	Idaho Boise	New York New York City Garden City	Texas Austin Dallas
	Illinois Chicago	Pennsylvania Philadelphia Scranton	Washington Bellevue

WHO WE ARE

Firm Overview

OUR PROMISE

Armanino delivers **impactful, bold solutions** that **increase clarity and spark success** for today and tomorrow.

When it comes to your success, we know addressing today's challenges is just as important as planning for the future. Our teams bring deep industry experience to help organizations reach peak performance today, and to help you prepare for the future.

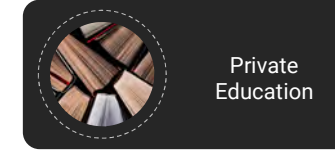
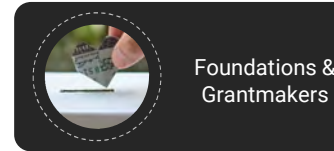
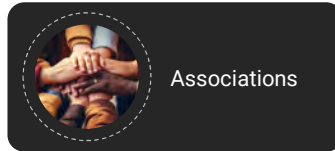
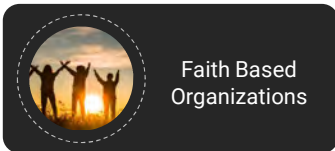
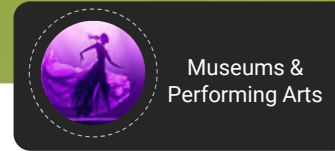
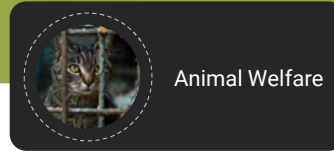
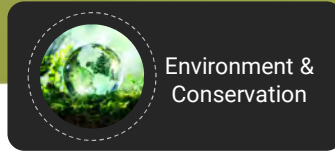
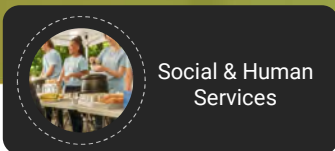
Recognition & Awards



EYEBROW COPY

Nonprofit Industry Expertise

Armanino's nonprofit practice is the largest industry group in our firm by client count. We proudly serve over 2,000 nonprofit and exempt organizations with a wide variety of accounting and consulting needs and have been doing so for over 50 years. At our core, Armanino's dedicated team of industry experts help nonprofits maintain and build organizational strength across the key finance functions needed to support mission-focused activities, both from an operational and strategic perspective. And while you are only seeking audit and tax services it may provide you with some comfort knowing that we are broad-based in services we can provide.



The Conversation Has Changed



Denial & Skepticism

- “Should we be using these tools?”
- “Let’s block Chat GPT.”
- “Is Gen AI another tech fad?”
- “I think we should wait a while.”



Realization & Optimism:

- “How can we use AI today?”
- “People are using it without permission.”
- “This is how we work moving forward?”
- “We can’t afford to wait.”

Nonprofit Verticals & AI Opportunities

What We've Been Hearing

Vertical Type	AI Adoption Curve Notes	AI Opportunity Focus
Social & Human Services	Exploring GenAI for case documentation and service coordination	Case note automation, beneficiary communication, program impact tracking
Environment & Conservation	Investing in data modeling and predictive analytics for field operations	Habitat monitoring, grant reporting, sensor data synthesis
Animal Welfare	Early adopters of automation for shelter operations and donor engagement	Intake tracking, volunteer scheduling, donor messaging
Museums & Performing Arts	Piloting GenAI for marketing and visitor engagement	Event promotion, membership renewal, audience feedback analysis
Faith-Based Organizations	Experimenting with GenAI for outreach and sermon support	Personalized donor messages, sermon summarization, volunteer coordination
Associations	Mid-stage adoption focused on member services and event automation	Member onboarding, policy updates, event follow-ups
Foundations & Grantmakers	Using GenAI for proposal evaluation and impact reporting	Grant review summaries, funding trend analysis, strategic planning
Private Education	Early experimentation with GenAI for curriculum and communication	Lesson planning, student performance insights, parent outreach

Nonprofit *Pain Points*

1

Repetitive or Manual Tasks

- Accounts receivable
- Accounts payable
- Email management
- Volunteer scheduling
- Monthly financial reporting (recording revenue, variance analysis, etc.)
- Reconciliations (banks, donations, etc.)
- Data entry
- Donor letters

2

Error-Prone or Quality Issues

- Journal entry approval process
- Credit card processing
- Budget process
- Expense/transaction coding
- Month-end variance analysis

3

Bottlenecks or Process Friction

- Accounts payable
- Integration of donor system to accounting system
- Fixing JE errors
- Lack of adoption of features / functionality from the broader organization

AI IN NFP BRAINSTORMING

What **AI Success** Would Look Like

If AI were working well across your organization in 12–18 months, what would be different?

- Automated bank reconciliations
- Automated journals / spend less time reclassifying journal entries
- Automated cash receipts
- Automated credit card processing
- Improved analysis on donors & giving capacity
- Quicker, smoother financial close and reporting aggregation

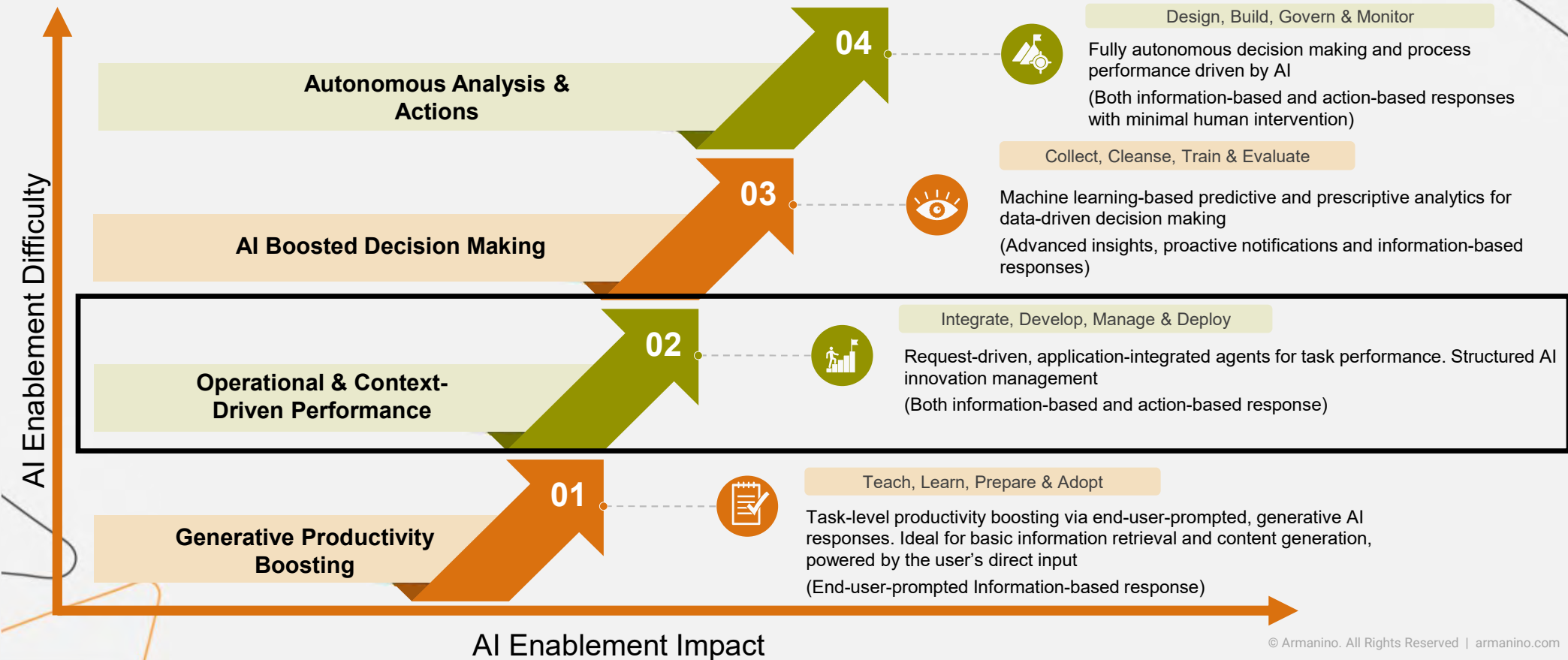
Interest in unattended automation

** High interest in donor engagement use cases

Highly ROI Conscious

HOW TO MAXIMIZE THE IMPACT OF YOUR AI ENABLEMENT JOURNEY

AI Enablement Framework



Two Flavors of AI: *Agentic vs.* *Generative*

If GenAI is your brainstorm partner,
Agentic AI is your best employee.

One **thinks** with you. The other **acts** for
you.

Creative Intelligence

Supports innovation by generating new ideas, content or solutions.

NFP Example: Generates email and social media content tailored to donor segments.

Context-Driven Content Creation

Produces written, visual or data summaries from prompts.

NFP Example: Drafts beneficiary stories from field notes for newsletters or grant reports.

Human-Like Personalization

Tailors responses to fit audience, tone and context.

NFP Example: Crafts customized thank-you messages for donors and volunteers.

Goal-Oriented Automation

Executes tasks with clear objectives, often with minimal human involvement.

NFP Example: Automatically processes recurring donations and sends receipts.

Task & Workflow Execution

Follows defined workflows to complete repetitive, high-volume processes.

NFP Example: Tracks reporting deadlines and auto-generates compliance alerts.

End-to-End Process Automation

Manages complex operations from input to action.

NFP Example: Coordinates volunteer shifts and disperses emails for sign-ups based on availability and event needs.



*Demo: Generative AI vs. Agentic AI
Donor Acknowledgements*



Demo: Audience Aware Communications



Demo: Grant Funding Anomaly Detection

Nonprofit Automates *Investment Activity*

Outcomes

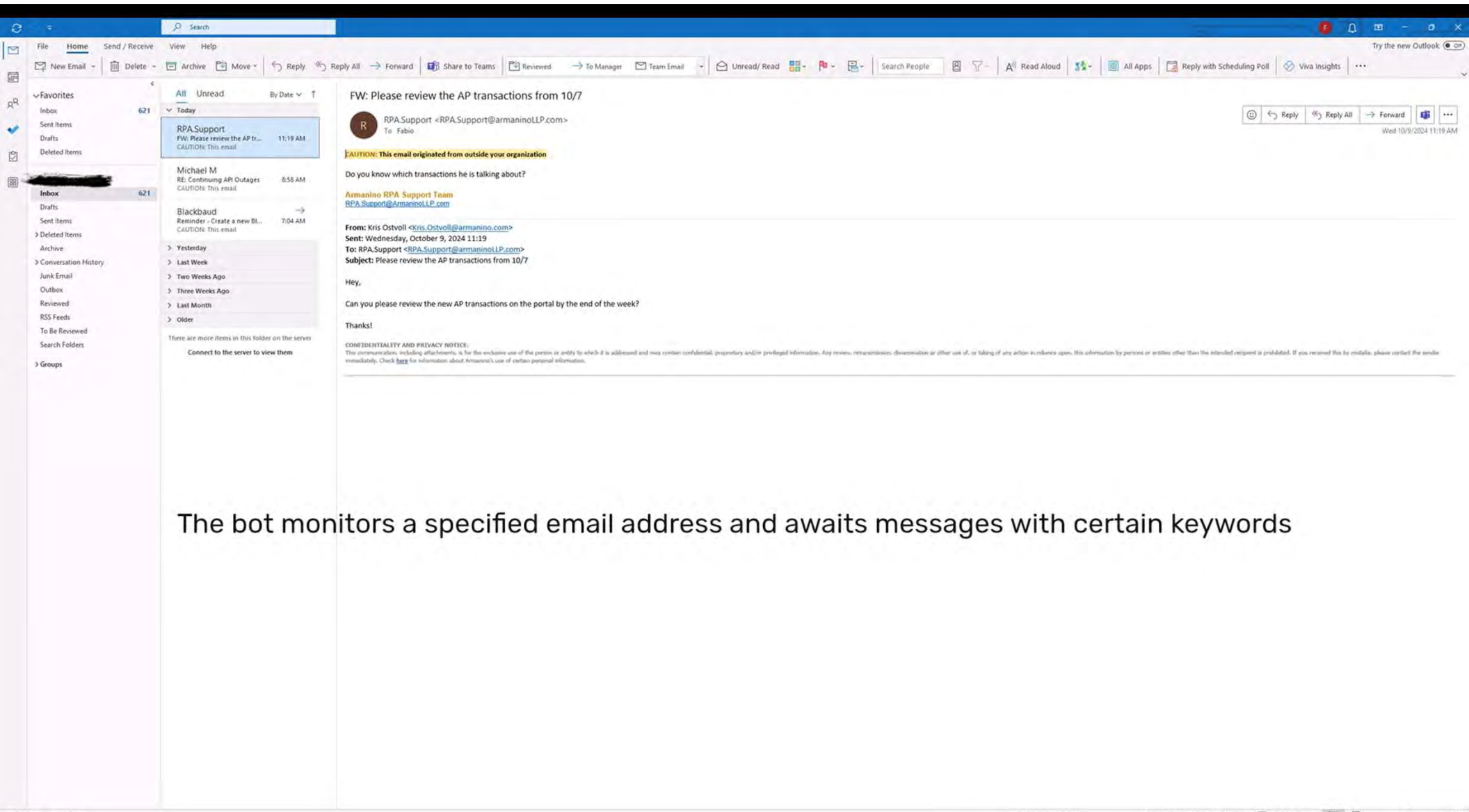
- Eliminated **500+ hours** / year of manual data processing for one team member
- “I’ve never seen her (the Accounting Manager) smile this big.” – VP of Finance & Accounting

Business Problem

- Client receives **100+** investment statements detailing their investment activity on a **monthly and quarterly basis**
- Each document is unique, so the team must spend **35-50 hours per month** reviewing the documents in order to create journal entries

Solution

- Digital worker extracts and standardizes data from the financial statements, performs calculations, and drafts a journal entry **without manual intervention**
- Drafted journal entries are **uploaded automatically** for approval
- Any unusual results are escalated to a supervisor
- **Scales automatically** as new investments are added



The bot monitors a specified email address and awaits messages with certain keywords

Integrate Sage Intacct & Grant Making Software

Business Problem

- Client's grants management software **cannot be integrated** with their accounting software
- The two systems must currently be kept in sync through **manual data entry**

[Read the full case study on the Armanino website!](#)

Solution

- Solution **interacts** with both web applications' user-interfaces **directly** to read or write from one system to the other
- Performs field-level reconciliation of data in both systems to make sure all data is **accurately synchronized**
- Leverages character recognition (OCR) capabilities to **extract data from PDFs**
- **Fully automated**, freeing up **valuable employee time** to focus on other tasks
- **Scales automatically** as the foundation grows

Approach to **Scaling AI** in Your Organization

AN AGILE INNOVATION MANAGEMENT
APPROACH TO AI ENABLEMENT



Armanino + AI in NFP

Key Areas to Consider

01

AI Maturity vs. Complexity

The intersection of AI sophistication and process complexity shapes both challenges and opportunities in each nonprofit vertical.

02

Barriers to Adoption

Data quality/integration, workforce upskilling, and change management are key hurdles.

03

Human-AI Collaboration

Emphasize AI as an enabler enhancing, not replacing, skilled nonprofit professionals.

04

Scalability

Start with targeted use cases, then scale across branches and geographies.

You Can't Spell Armanino Without "AI"

Connect with us:

Stacie.Cornwell@armanino.com

Lauren.N@armanino.com

Brenda.Kahler@armanino.com

Armanino Operates in an Alternative Practice Structure:

“Armanino” is the brand name under which Armanino LLP and Armanino Advisory LLC, independently owned entities, provide professional services in an alternative practice structure in accordance with law, regulations, and professional standards. Armanino LLP and Armanino CPA LLP are licensed independent CPA firms that provide attest services, and Armanino Advisory LLC and its subsidiary entities provide tax, advisory, and business consulting services. Armanino Advisory LLC and its subsidiary entities are not licensed CPA firms.