2025 Leadership Programme

Fundraising Innovation 1 Action Lab Report

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Introduction

The 2025 Resource Alliance Leadership Programme was co-designed with participants, based on an extensive consultation with and surveys of leaders across the sector, to ensure the content delivered on the ambition and priorities of the group.

The 2025 programme consisted of four Leadership Summits, six regional Peer Leadership Groups and four Action Labs addressing the topics our community of leaders told us mattered the most to them right now – Innovation, Strategy & People, and Climate.

The Action Lab covered in this report is Fundraising Innovation (Group 1). Over the course of the year, this group met four times online (2-hour meetings) and once in-person/hybrid during the IFC 2025 conference.

In the first Action Lab meeting, the participants used an online Miro board to share the areas of Fundraising Innovation they would most like to tackle as a group, and then co-created an 'Action Framework' covering their Vision, Goals, Strategies & Measurements, which was then used to guide their work together for the rest of the year.

The next page of this document contains the full Action Framework co-designed by the Action Lab members in **Meeting 1**, then the remainder of the report details their progress in achieving the goals set at the start of the year.

Leadership Programme 2025
Fundraising Innovation 1 Action Lab

VISION – What is our shared dream?

This Lab aims to transform fundraising amid challenges like declining donor trust, resource scarcity and digital disruption. Focused on equipping fundraisers with essential tools and knowledge, emphasising AI to democratise access to technology, particular for smaller organisations. Committed to collaborative solutions, centering diverse voices, amplifying effective practices, and promoting open learning to drive sector-wide transformation. The vision is a future where fundraising is more efficient, inclusive, strategic, and human-centered.

GOALS
How do we make our vision concrete & measurable? How high do we set the bar?

Create a CustomGPT "Fundraising Super-Agent" and other related resources
- Collaboratively, we have decided that this CustomGPT will be a **Funder-Finder & Opportunity Matcher**
- Ethics must remain central
- Use pre-existing peer reviews, research and knowledge bases to train the model
- Include "user instructions", a "prompt library", and "guide to interpreting outputs" to ensure users get the most out of it
- Host the CustomGPT on a platform that is freely available and culturally accessible

Empower small organisations to confidently and effectively use AI tools
- Ensure the CustomGPT functions effectively for organisations of all sizes
- Recommend low/no-cost AI tools for fundraising
- Collect and share case studies of effective AI use in grassroots organisations

STRATEGIES
What important choices do we make to realise the vision?

- Harness group's international reach.
- Define clear roles, responsibilities and realistic deliverables for sub-groups
- Use simple project management tools (e.g. Trello) to track actions/deadlines
- Build strong peer exchange through RA Community Platform and use a WhatsApp group for urgent comms
- Present ideas to other Labs for cross-pollination and feedback
- Reflect regularly on learning and progress, and adapt as needed
- Stay informed on evolving trends and integrate them into Lab outputs
- Ensure input into the Lab work from a diverse group of fundraisers.

MEASUREMENTS
How do we measure progress once action areas are identified?

Progress & Process Tracking
- Agree key outputs and timelines early
- Use Trello and reporting templates to monitor ownership and milestones

Capturing Learning
- Use simple, rapid feedback methods (short surveys, group check-ins)
- Create a "How AI supported us in this Action Lab" mini case study doc
- Document lessons learned, emerging themes, and success stories in a shared resource pack at year-end.

Sharing and Sector Contribution
- Ensure that the final outputs are shared openly for others to access
- Encourage other sector actors to engage with and adapt resources
- Develop a final "Highlights Pack" and/or session at IFC 2025 to showcase achievements

ACTIONS
Meetings scheduled to pursue goals

Action Lab Meeting 1
Tue 22 April
15:00 – 17:00 BST

Action Lab Meeting 2
Thu 19 June
15:00 – 17:00 BST

Action Lab Meeting 3
Thu 11 Sept
15:00 – 17:00 BST

IFC In-Person Meeting
14 – 17 October

Action Lab Meeting 4
Wed 12 Nov
15:00 – 17:00 GMT

Executive Summary

This report covers in detail how the members of this Action Lab achieved the goals they set themselves at the start of the year through their Action Framework.

On this page, we provide a **quick summary of progress against each goal:**

Goal 1: Create a CustomGPT "Fundraising Super–Agent" and other related resources
This goal was refined after Meeting 2 to specifically focus on developing a CustomGPT that would function as a **Funder–Finder & Opportunity Matcher**, a free tool to help organisations identify suitable grant funders. The Action Lab succeeded in co–building this tool by the end of Meeting 3 – **here is a link to access the finished CustomGPT** (see **page 15** for more details). The tool is hosted on the Resource Alliance ChatGPT account, free to access, and globally usable. The group also produced a clear set of **User Instructions** to ensure fundraisers get the most out of the tool (see **page 16**). In order to keep the tool functioning to a high level, there will now be a further period of review and feedback from the wider Leadership Programme group, and then regular updates and maintenance after it is publicly launched at the beginning of 2026.

Goal 2: Empower small organisations to confidently and effectively use AI tools
There is some overlap here with the goals set by the *other* Fundraising Innovation Action Lab also running as part of the 2025 Leadership Programme. That group collected and shared case studies of effective AI use in grassroots organisations, so this Lab decided not to replicate the work directly. Instead, they focused on ensuring the CustomGPT they developed **functions effectively for organisations of all sizes** and is **particularly useful for smaller organisations** who need to identify suitable funding opportunities. The majority of participants in this Lab represented grassroots organisations (**see page 25**), so this goal has also been achieved by training and empowering *them* to confidently and effectively build their own AI agents in the future.

Meeting 2 Agenda

Time	Focus
15 mins	Welcome, scene-setting, sharing updated Action Framework
30 mins	Guest speaker: Tash Rosenthall, Client Managing Director, DTV Group - sharing achievements and learnings of the 2024 Fundraising Innovation Action Lab
20 mins	CustomGPT explanation and demo from Josh Hirsch
30 mins	Group discussion to confirm focus for building our own CustomGPT
10 mins	Next steps / looking ahead

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Meeting 2 Outcomes

Working Draft: Scoping a Custom GPT for Fundraising Innovation

Overview

As part of our Innovation Action Lab, we are exploring the opportunity to build a bespoke GPT to support fundraisers across the globe. This tool would be a tangible output of our shared learning and collaboration, aimed at providing value to fundraisers in a practical, accessible, and forward-looking way.

This document outlines the concept, challenges we face in defining the scope, some possible directions we could take, and questions to help us land a strong, shared focus.

The Opportunity

A custom GPT (Generative Pre-trained Transformer) can serve as a dynamic AI-powered assistant. It can:

- Answer complex fundraising questions
- Suggest prompts, campaigns, or strategies
- Assist in storytelling, proposal writing, and donor comms
- Offer ethical guidance and innovation inspiration
- Be shaped by the shared knowledge and values of our cohort

Built well, it could be a powerful sector-wide resource, tailored by and for fundraisers.

The Challenge of Scope

The most pressing challenge is deciding what kind of GPT we want to build. This group spans:

- High value, mass, corporate, trust, and foundation fundraisers
- Individuals from large INGOs, small community orgs, and everything in between
- Fundraisers working in different countries and operating within different regulatory, cultural, and philanthropic contexts

Innovation itself is also a varied concept. For some, it's about using AI to increase efficiency and free up time. For others, it's about fundamentally rethinking how fundraising works. A custom GPT cannot be all things to all people. If we don't make some decisions now, we risk building something too shallow or too scattered to be genuinely useful.

Options for Focus

1. **Storytelling & Messaging GPT**
   - Focuses on using AI to help fundraisers craft, critique, and adapt powerful stories.
   - Prompts and suggestions grounded in emotional resonance, ethical storytelling, and brand voice
   - Relevant for donor comms, proposals, cases for support
   - Could include training from sector literature and practice

2. **Fundraising Efficiency GPT** *(refined version of Strategic Assistant)*
   - Focuses on repeatable fundraising tasks that can save time and improve productivity:
   - Drafting donor emails, segmenting supporter lists, summarising reports
   - Could include ethical guardrails and quality checks
   - More focused and achievable than an all-in-one 'strategy GPT'

3. **Fundraising Innovation Companion GPT**
   - Designed to surface and explore new funding models, global examples, and unconventional strategies.
   - Helps users think differently, challenge assumptions, and ideate
   - Could include training on Reimagining Fundraising, SOFII, and similar repositories
   - Geared more toward inspiration than execution

4. **Campaign Concept GPT**
   - A creative aid for brainstorming campaign ideas:
   - Suggests seasonal hooks, messages, creative frames and propositions
   - Helps translate audience insight into campaign direction
   - Could integrate behavioural science or emotional drivers

5. **Segmented GPTs by Discipline**
   - Instead of one, we build mini-GPTs for different types of fundraising:
   - One for trusts & foundations, one for corporates, one for mass…
   - Allows greater depth and specificity
   - **Note**: This would require significantly more time, effort, and coordination than may be feasible within our current lab timeframe. It's worth considering, but likely outside the realistic scope for this project.

6. **Modular Global GPT**
   - One GPT with selectable regions and fundraising contexts:
   - User selects region, fundraising type, or goal
   - GPT adjusts tone, examples, and suggestions based on local norms and priorities
   - **Note**: This approach is promising for long-term adaptability, but, similar to above, would involve extensive input and training material that may be too resource-intensive to complete within our lab's timeline.

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Embedding the Global Dimension
- Rather than aiming for universality, we can build in plurality.
- Invite cohort members to contribute training material and prompts from their own country or region
- Use a "context selector" in the GPT to adjust outputs
- Ensure language and tone guidance reflect cultural diversity
- Include innovation examples from the Global South and underrepresented geographies

Questions to Guide Our Decision
1. What do you most wish this GPT could help with in your work?
2. What kind of fundraising (discipline, org size, geography) would you want it to work best for?
3. Is it more useful for it to help with doing (efficiency, execution) or thinking (strategy, innovation)?
4. Should we prioritise breadth (all fundraisers, all contexts) or depth (do one thing really well)?
5. Are there key documents, datasets, or frameworks from your region you could share to train it?
6. Would you use this as a day-to-day tool, or more as a strategic or training resource?

Next Steps
Please reflect on these questions and come prepared to share your thoughts in our next meeting. We'll use the session to:
- Agree a core focus for the GPT
- Assign contribution tasks (training data, prompts, documents)
- Identify sub-goals and additional features (ethics, innovation, case studies)

Together, we have the opportunity to build something bold, collaborative and globally useful. Let's make it count.

Analysis of Responses to CustomGPT Survey (post-meeting)

Key Themes in the 13 "Fundraising Super-Brain" Survey Responses:

Theme / Desired Capability	Typical asks & example phrasings	# of mentions
Funding-opportunity matching & alerts	"Search for funding opportunities that fit our work… match my project briefs to funders… notify me when a window opens."	7
Network / contact mapping & warm-intro guidance	"Map my 1st & 2nd-degree contacts… suggest outreach messaging… identify coalitions or thematic partners."	3
Proposal / report generation & polishing	"Streamline proposal writing… draft reports… supply MEAL frameworks, logframes, narratives."	3
Monitoring, evaluation & benchmarking	"Track our activities and impact… share sector averages, attrition rates, KPIs."	3
Donor-journey personalisation & comms	"Generate cross-selling journeys… improve supporter stewardship emails."	3
AI-for-fundraisers meta-learning	"A GPT that teaches how to build other GPTs… offers an ethics/bias check or idea-viability score."	1
Wellbeing / burnout diagnostics	Embedded in one broader "multi-tool" request (suggested "burnout score" module).	1

High-level take-aways
- The strongest shared pain-point is finding & qualifying funders quickly.
- Users want hands-on outputs (lists, drafts, dashboards) rather than high-level advice.
- Ethical safeguards, relevance to small/grass-roots orgs, and ease of interpretation are recurring concerns.

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Suggested Scope for the "CustomGPT Fundraising Super–Agent"

Core module (Phase 1)

Pillar	What it would do	Why it aligns with survey demand
Funder–Finder & Opportunity Matcher	• Match project briefs / keywords to live grant databases, philanthropy news feeds, and institutional calls. • Summarise "why this is a fit" & red–flag misalignments. • Generate a concise "one-page outline" for each match (mission fit, avg grant size, past grantees, deadline, key angles).	Addresses 7 of 13 asks & provides immediate "time-saver" value.

Support modules (Phase 2, depending on capacity)

Module	Light description	Survey interest
Proposal & Report Drafter	Turns bullet inputs or previous proposals into first drafts, plus MEAL tables, budgets or logframes.	3 mentions
Network & Coalition Mapper	Imports user's contact lists, LinkedIn/CSV, or RA Community data; surfaces mutual contacts and suggested warm intros.	3 mentions
Benchmark & Insight Dash	Supplies quick benchmarks (e.g., RG attrition, average gift) and sector trend commentary.	3 mentions

(Each add-on use the same underlying GPT instance with different prompt-chains)

Recommendations for the Lab

- **Start narrow, prove value, then expand:** Kick-off with the Funder–Finder core; it's the clearest common need and easiest to demo tangible ROI.
- **Co-create a lightweight ethics & interpretation guide up–front:** Build trust by baking in bias checks, data-source transparency, and reminders that AI output must be human-validated.
- **Pilot with two or three small / grass-roots organisations first:** Ensures usability for low-resource contexts and surfaces localisation issues early.
- **Host on an open, no-login (or free) interface:** Consider RA Community

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single-sign-on or a public ShareGPT link to keep barriers low across geographies.

- **Iterate in public**: Encourage Lab members to log what works, what's misleading, and ethical edge-cases; feed that back into prompt-tuning and the user guide.
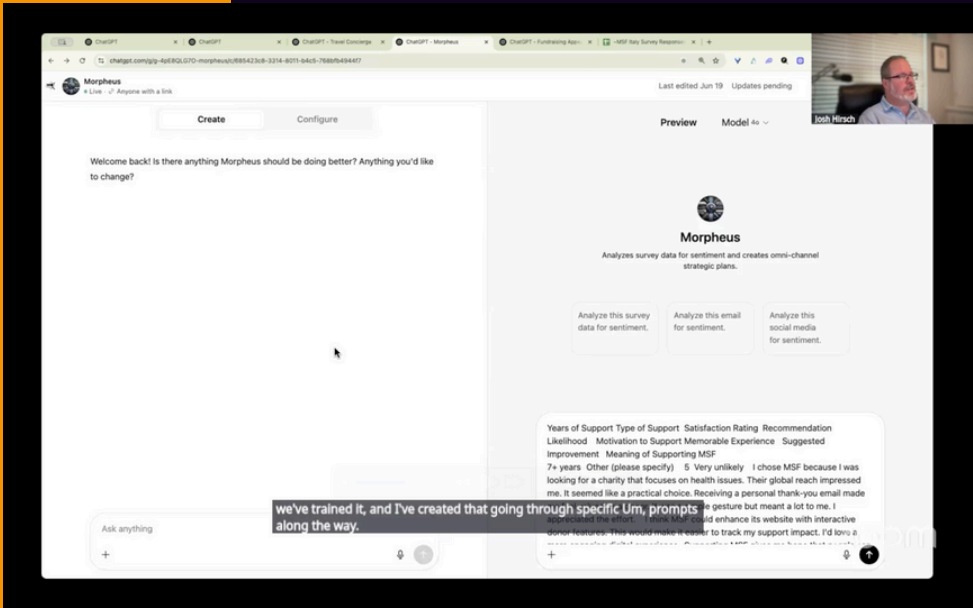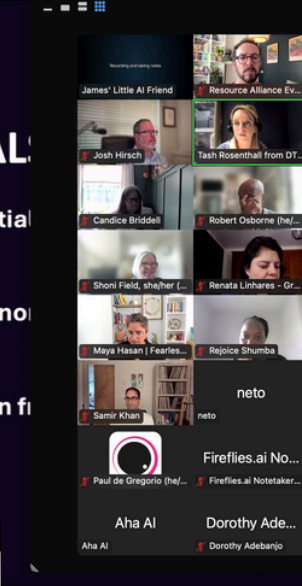
Following this phased, user-centred approach will let the Lab deliver a h**igh-impact MVP** within the year while laying the groundwork for broader functionality (proposal drafting, network mapping, benchmarking) as capacity and appetite grow.
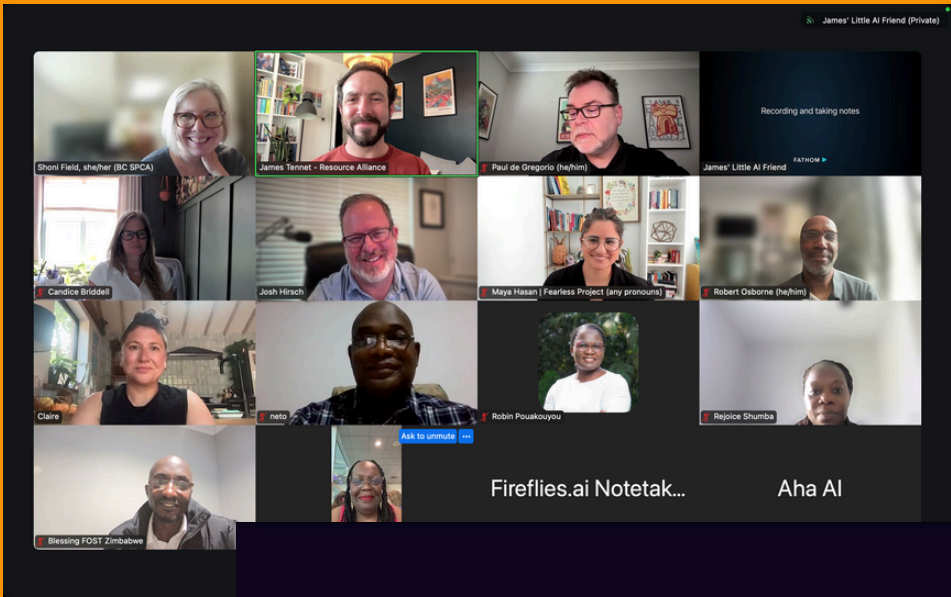
Meeting 2 Visuals

Meeting 3 Agenda

Time	Focus
10 mins	Scene-setting, agenda for today, recapping our main goal, confirming the desired outcomes from today
30 mins	Initial stage of CustomGPT live build – using ChatGPT to help – led by Claire Daniels
30 mins	Breakout group work developing likely questions from users, template response, and desired persona of our CustomGPT
30 mins	Second stage of CustomGPT live build – configuring the CustomGPT – led by Claire Daniels
5 mins	Round-up, next steps, looking ahead

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Meeting 3 Outcomes

CustomGPT Build Process

The entirety of this meeting was dedicated to building the chosen CustomGPT. The finished product can be accessed in the ChatGPT 'GPT Library' via the link below:

<u>Funder–Finder & Opportunity Matcher</u>

The group also saved two ChatGPT threads for further learning and future review:
- Here is the full <u>ChatGPT prep thread used to design the build</u> of the CustomGPT (every prompt and instruction is in there so it is a very useful template for future builds).
- Here is the <u>first live test</u> performed on the CustomGPT once the tool was built.

As part of the process, the group also co-created some **user instructions** to help fundraisers get the most out of this valuable tool. These instructions **can be found on the next page.**

Funder–Finder & Opportunity Matcher
CustomGPT – User Instructions

We recommend you include the below information when writing your prompts for this CustomGPT.

If you don't have all this information, you can still use the tool – the more context you can provide in your prompt, the more valuable the responses you receive will be.

1. About Your Organization & Project
- Name of organization (optional if anonymous).
- Type of organization (NGO, community group, research institute, etc.).
- Project title or focus area (e.g., maternal health, arts education, climate resilience).
- Project description (1–3 sentences: what it does, who it serves, expected impact).

2. Funding Request Details
- Amount of grant funding sought (range or specific).
- Timeline (short–term project, multi–year initiative, ongoing program).
- Whether you are looking for project–specific or core/flexible funding.

3. Geography
- Country/countries of operation.
- If applicable, diaspora connections or communities served.

4. Application Preferences
- Open calls vs. closed calls (do you only want funders with open calls?).
- Whether unsolicited applications are acceptable/desired.

5. Funding Approach Interests
- Interest in innovative funding models (trust–based philanthropy, participatory grantmaking, flexible funding).
- Interest in family foundations or diaspora–led funders.

6. Decision–Making Criteria
- Level of effort/resources available for applications (e.g., small team, limited time, experienced grant writers).
- Importance of aligning with funder's prior history of awards.
- Appetite for risk: prioritize "likely funders" vs. "stretch/innovative funders."

Meeting 3 Visuals
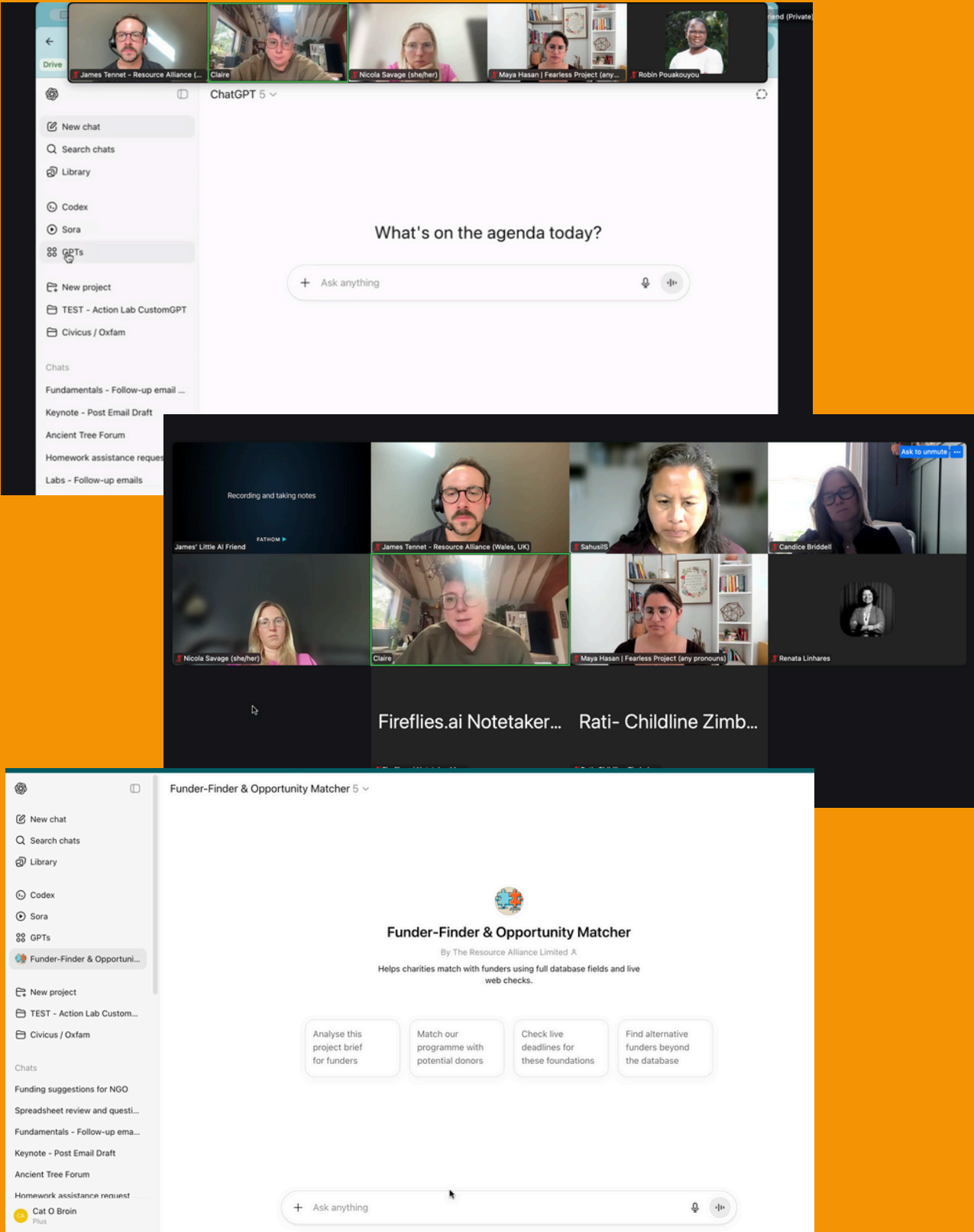
Meeting 4 Agenda

Time	Focus
10 mins	Scene-setting, agenda for today, recapping our progress
60 mins	Live stress-testing of our CustomGPT – <u>The Funder–Finder & Opportunity Matcher</u>. Participants to provide real–life use cases for testing in the meeting
20 mins	Looking ahead: Launching, promoting, and maintaining the tool
10 mins	Round-up final thoughts, thank yous, next steps

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Meeting 4 Outcomes

Live stress-testing of the Funder-Funder Opportunity Matcher CustomGPT

Scene-setting and purpose of the final meeting
- The **primary goal** – now achieved – was to **co-create the Funder-Finder & Opportunity Matcher CustomGPT**, a free tool to help organisations (especially smaller ones) identify suitable grant funders.
- The tool is:
  - Hosted on RA's organisational ChatGPT account
  - Globally usable in principle (not restricted to one region).
  - Supported by a set of **User Instructions** and a **funder database spreadsheet**.
- A secondary goal was to help small organisations gain confidence using AI tools, which has been achieved in part through the shared learning of building and testing the CustomGPT together.

Data, training set and user instructions – where the tool stands now
Before testing, James recapped the **under-the-bonnet elements** of the tool:
- **Funder spreadsheet:**
  - A Google Sheet of funders with details such as region, focus areas, type of support, and a "**data from / last updated**" column.
  - Currently "quite current", but he stressed it will become out of date over 1–2 years, so maintenance processes will be needed later.
- **Training on grant-seeking know-how:**
  - James has assembled articles and guides from respected sector bodies (e.g. CIOF, NCVO) explaining:
    - Different types of trusts and foundations
    - How to find grants
    - How to write strong applications
  - His plan is to feed these resources into the CustomGPT so that, alongside matching funders, it can also give credible process advice (how to approach, structure proposals, common pitfalls, etc.).
- **User Instructions document:**
  - The group had already co-created a concise, practical **User Instructions** guide which:
    - Sets expectations (what the tool can / cannot do).
    - Specifies the **input template** – what information users should provide about their project (region, cause, scale, assets, etc.) to get good results.

Live stress-testing with real project scenarios

Most of the meeting was devoted to **running the tool against real-world scenarios** supplied by participants from different regions. The goals were to:

- Check if **top matches felt credible** given geography, focus area and scale.
- See how well the tool used **both**:
  - The internal funder database, and
  - Live web search (for additional or more up-to-date options).
- Evaluate the **usefulness of the narrative explanation and tabular summary** in the responses.

Example tests

1. **James's RA-style scenario (warm-up)**
   - Used as an initial test case.
   - Tool asked good clarifying questions instead of jumping straight to a list, which the group found reassuring.
2. **Multiple participant projects (Africa, UK, others)**
   - Several people (e.g. Rejoice, Dorothy, Maya, Nicola) contributed scenarios from different countries/regions.
   - For each, James pasted their project brief into the CustomGPT and shared the results:
     - The tool generally produced **10 or so suggested funders**, many of which looked realistic and appropriate for the region and theme.
     - It often combined **database matches** with **web-discovered options**, and sometimes clearly stated when it was going beyond the dataset.
     - It provided **brief rationale** for each recommended funder and, in some cases, **next-step suggestions** (e.g. structure of first approaches, possible application strategy, parallel bids, partnership angles).
     - Responses frequently came with **structured tables** summarising funders, grant size, fit, and current status, which participants found helpful for scanning and prioritising.

Overall, the live tests showed that the tool:

- Is capable of **asking clarifying questions** before recommending funders.
- Produces **reasonably strong matches** in the geographies tested.
- Can **generate practical next-step suggestions** and structured summaries that feel usable.

The consensus in the room was that the tool is already "**pretty good**" and clearly useful, while leaving space for improvement via further training and data expansion.

Launch, feedback, and maintenance – how this lives beyond the Action Lab

James set out a staged launch plan:

Launch, feedback, and maintenance – how this lives beyond the Action Lab
James set out a staged launch plan:

1. **Internal to the Leadership Programme**
   - Short-term next step: share the CustomGPT link and User Instructions with the **full Leadership Programme** (not just the FI1 Lab), encouraging them to test it with their own project briefs.
   - This broader group testing will generate more feedback and help iron out issues before the wider launch.

2. **Wider RA community in 2026**
   - As with other Action Lab outputs, RA will send a **dedicated email early next year** showcasing:
     - The Funder-Finder & Opportunity Matcher
     - The User Instructions
     - Possibly a short "story" of how it was co-created in this Lab
     - This email will go to the broader RA community and point them to the tool and resources housed on the RA platform.

3. **Ongoing visibility**
   - The tool will sit under RA's organisational ChatGPT account, allowing future Action Labs and RA projects to reference it and potentially layer on additional tools over time.

Final tweaks before launch
Before sending it out more broadly, James committed to:

- **Implementing feedback** captured during and after the meeting:
  - Adjust some fields/headings in the **funder spreadsheet**.
  - Clarify and polish the **User Instructions** so the inputs and expectations are as clear as possible.
- **Training the tool** on the curated set of:
  - Grant-seeking articles and blogs (e.g. from CIOF, NCVO).
  - Other high-quality resources the group has shared or will share.

Maintenance and refresh model
Josh and James spent time on the question: **who maintains this tool and how?**
Key points agreed:

- **Ownership**
  - Primary responsibility for maintenance sits with The Resource Alliance, not the individual Lab members.
  - Practically, that means James (and RA colleagues) will:
    - Monitor performance and feedback.
    - Decide when a **refresh of the dataset** is needed.
    - Oversee structural changes to the tool or User Instructions.

- **Community contribution**
  - While no one in the Lab is obligated to keep working on it after the programme, James will:
    - **Email this group** when a first major refresh of the database is planned.
    - Invite those who wish to help to **contribute updates** (e.g. new funders, changed priorities, better regional coverage).
  - Josh suggested creating a simple **shared feedback space** (e.g. Google Doc or feedback form) where users can:
    - Drop examples of odd or incorrect matches.
    - Suggest new funders or resources.
    - Flag out-of-date entries.
- **Recognising data decay**
  - Everyone acknowledged that funders' priorities and open calls change frequently; the "data from" column in the spreadsheet is critical for monitoring age/freshness.
  - The group accepted that while the **first version** will go out soon, part of the model is that it can be improved incrementally over time as data is refreshed and feedback is incorporated.

Meeting 4 Visuals
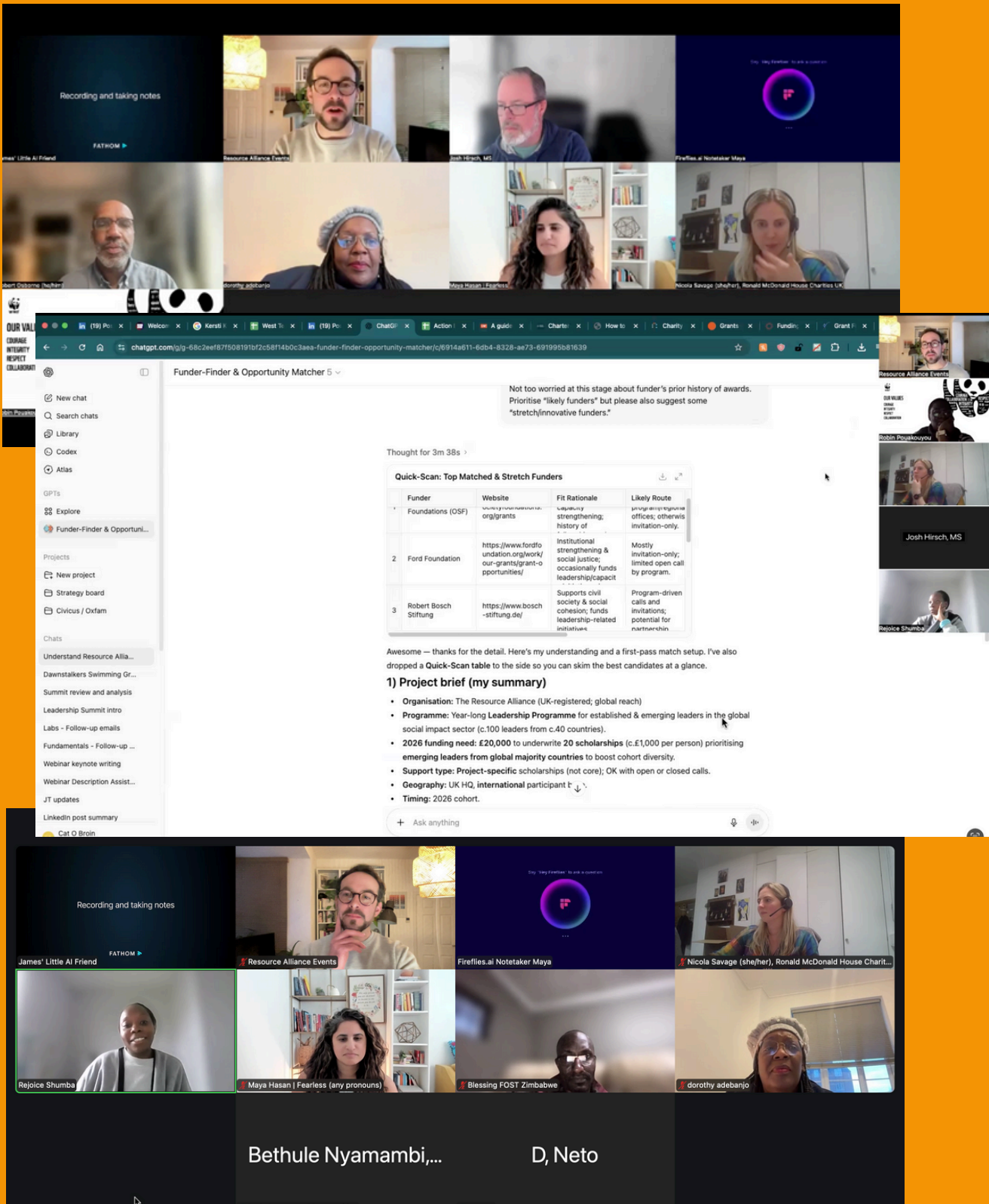
Conclusion & Next Steps

This Action Lab has delivered strongly against the goals set at the start of the year, translating a broad initial ambition - supporting fundraisers to use AI in practical, equitable ways - into a practical and useful long-term sector resource. Over the course of the year, members moved from exploring what an "AI fundraising super-agent" could be to co-creating a focused tool with immediate value: the **Funder-Finder & Opportunity Matcher CustomGPT**, designed to help organisations of all sizes identify suitable grant funders more efficiently and confidently.

A central achievement of the Lab was not only building the tool itself, but stress-testing it through live scenarios shared by participants across different regions. This testing demonstrated that the CustomGPT can ask clarifying questions, generate credible shortlists of potential funders, and provide structured output - combining narrative rationale with scannable summaries that help users prioritise next steps.

The Lab has also produced clear user instructions to ensure users get the most out of the tool. The CustomGPT is underpinned by a deeply researched, global funder database that is easy-to-update, and has been informed by curated grant-seeking know-how from trusted sector sources.

Through the shared process of designing, building, and testing the CustomGPT together, Lab participants have reported increased confidence in using similar AI tools in their own work and will take these learnings back to their organisations.

The tool will now be disseminated through Resource Alliance channels, and the CustomGPT will be hosted as a long-term community asset. Ongoing maintenance will require a periodic dataset refresh, reflecting the reality that funder information changes over time.

Together, these steps will ensure that the work of this Action Lab creates long-term benefit for the Resource Alliance Global Community and the wider social impact sector - helping more organisations access funding opportunities, while building confidence in responsible, human-led use of AI in fundraising.

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