



**2025 Leadership Programme**

# **Fundraising Innovation 2 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 2). 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 2 Action Lab

### VISION – What is our shared dream?

We envision fundraising as a transformative force for social change, moving beyond mere transactions. In response to global instability and rapid technological advancements, our Lab aims to reimagine how the social impact sector generates and sustains resources, particularly by harnessing the power of AI. We promote ethical, inclusive, and locally rooted fundraising, leveraging technology to benefit the entire ecosystem. We are committed to amplifying community-led solutions & fostering connections through mentoring & shared learning.

### GOALS

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

#### AI & Technology in Fundraising

- Build an **AI Use Case Library** showcasing ethical and effective a social impact sector case studies from around the world. The library will be co-created through peer sharing, expert speaker contributions, and curated research, with a focus on accessibility and relevance for fundraisers at all levels.

#### Equity & Capacity in the Global Fundraising Ecosystem

- Utilise the **RA Global Community Platform** to build a **Mentoring Network** that connects emerging and established fundraisers across geographies.
- Focus on **inclusive fundraising case studies** from community-led and locally driven fundraising efforts, particularly those highlighting underrepresented and grassroots communities, as a way to connect people through the mentoring network.

### STRATEGIES

What important choices do we make to realise the vision?

#### Knowledge Sharing & Peer Exchange

- Form small working groups to encourage participation and focus on key outputs between Lab meetings.
- Utilise peer-to-peer knowledge exchanges to surface real-world practices – including what works and what doesn't.
- Collect case studies internally from participants across countries and organisational sizes.
- Host a roundtable and/or session at **IFC 2025**.

#### Ongoing Communication & Co-Creation

- Use WhatsApp and RA Community Platform to stay connected.
- Centralise shared content and updates in an accessible digital workspace.
- After each meeting, define clear action items, timelines, and responsible parties for each output.

### MEASUREMENTS

How do we measure progress once action areas are identified?

#### Progress Tracking & Reflections

- Develop shared visual dashboard to track our outputs, milestones, and contributions – enabling real-time transparency and accountability.
- Mid-year report/exchange session with other Action Labs.

#### Impact Metrics

- Pre/post-surveys to capture changes in confidence, leadership, or skills.
- Assess how outputs are used by the wider sector (downloads, shares etc).

#### Reporting Formats

- End-of-year detailed report
- Create poster or infographic to summarise key outcomes.

#### Reporting Formats

- End-of-year celebration and sharing session to recognise contributions.

### ACTIONS

Meetings scheduled to pursue goals

#### Action Lab Meeting 1

Tue 1 April  
08:00 – 10:00 BST

#### Action Lab Meeting 2

Tue 17 June  
10:00 – 12:00 BST

#### Action Lab Meeting 3

Wed 3 Sept  
08:00 – 10:00 BST

**IFC In-Person Meeting**  
14 – 17 October

#### Action Lab Meeting 4

Thu 13 Nov  
08:00 – 10:00 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: Build an AI Use Case Library showcasing ethical and effective a social impact sector case studies from around the world. The library will be co-created through peer sharing, expert speaker contributions, and curated research, with a focus on accessibility and relevance for fundraisers at all levels.**

The Action Lab achieved this goal primarily through the peer-to-peer sharing of successful AI use-cases in **Meeting 2 (see pages 6–14)**. Beyond the conclusion of this Action Lab, the Resource Alliance will add these AI use cases with similar examples collected by the 2024 Action Lab – creating a final library of 10+ successful use cases. The next phase will involve Resource Alliance sharing these examples for the benefit of the wider xommunity.

**Goal 2: Utilise the RA Global Community Platform to build a Mentoring Network that connects emerging and established fundraisers across geographies.**

This task was also a success in terms of building a plan for such a mentoring network (**see pages 20–22**). While there wasn't time for the Action Lab to implement this mentoring project, the Resource Alliance will now take forward the planning and discussion work completed here and make it a reality on the Global Community platform in 2026.

**Goal 3: Focus on inclusive fundraising case studies from community-led and locally driven fundraising efforts, particularly those highlighting underrepresented and grassroots communities, as a way to connect people through the mentoring network.**

This goal was achieved through the diversity of sharing by participants in the Action Lab. At all stages of discussion and peer-to-peer learning we ensured community-led and locally driven fundraising efforts were included. The Resource Alliance will now utilise the inclusive fundraising case studies collected in the activation of the planned mentoring network.

# Meeting 2 Agenda

Time	Focus
15 mins	Welcome, scene-setting, confirming Action Framework
45 mins	<p>Peer-to-peer sharing of successful AI use cases:</p> <ol style="list-style-type: none"> <li>1. Carrie (Donor Republic) – AI copywriting tool for event fundraising journey</li> <li>2. Lilian (AMREF) – AI powered partnership with Absa Bank</li> <li>3. Elsbeth (WWF/WFP) – AI F2F fundraising training</li> <li>4. Ignacio (SOS) – AI powered virtual assistant &amp; AI chatbot</li> <li>5. Diana (ToroDev) – AI-enhanced data analysis for policy advocacy</li> <li>6. Sergiy (ADRA) – AI in PR, photo and video</li> <li>7. Engwase (ZGF) – 3 examples: Community engagement, security and organisational support</li> </ol>
10 mins	Group reflection on the peer-to-peer sharing. Where are the gaps in our shared knowledge of AI implementation?
30 mins	Creating a Mentoring Network on the RA Community Platform
10 mins	Next steps / looking ahead

# Meeting 2 Outcomes

## Peer Sharing of Successful AI Use Cases

 **AI Use Case: Enhancing Event Fundraising Journeys with AI Copywriting Tools**  
*Carrie Fletcher, Group Account Director of Digital at Donor Republic (Australia)*

### Overview:

Carrie Fletcher opened the Fundraising Innovation Lab's peer-sharing session by highlighting Donor Republic's innovative use of AI copywriting tools to optimise the supporter experience for event-based fundraising. The agency specialises in fundraising strategy and creative solutions, and Carrie's digital leadership has focused on using AI to streamline and enhance donor engagement journeys.

### Details:

Carrie described how her team deployed AI tools — including copywriting engines — to build out sophisticated supporter engagement sequences. These journeys were focused on pre- and post-event communications and were designed to drive higher levels of emotional connection and fundraising outcomes.

- **Journey Mapping with AI:** They mapped out comprehensive supporter journeys for fundraising events. This included stages like registration, pre-event encouragement, day-of-event motivation, and post-event stewardship.
- **Message Customisation:** AI helped to personalise messaging across channels (email, SMS, and social) based on user behaviours and engagement patterns. For example, people who hadn't yet completed registration might receive an encouraging nudge framed around impact and urgency.
- **Speed & Efficiency Gains:** AI dramatically reduced the time required to produce multiple variants of copy. Instead of manually writing 20+ email and SMS versions, the team used AI prompts to generate a wide range of tone-adjusted, audience-specific messages. Human review and refinement were still critical — but the initial "blank page" problem was eliminated.
- **Human + Machine Collaboration:** Carrie was clear that AI did not replace the creative process — rather, it accelerated it. Writers retained control, but AI gave them a strong head start. It also prompted new messaging directions that they might not have otherwise explored.

### Outcomes:

- Significant time savings across campaign planning cycles

- Improved segmentation and message customisation
- Higher supporter retention and conversion through more relevant, timely communications

### Reflection and Learnings:

Carrie emphasised the importance of guiding AI with clear inputs — strong briefs, tone requirements, and audience personas all improve outputs. She also noted that ethical considerations around authenticity and transparency remain essential when deploying AI-generated content in supporter-facing channels.

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### 😊 AI Use Case: Face-to-Face Fundraising Training at Scale

*Elsbeth de Ridder, Global Fundraising Specialist at WFP / WWF (Spain)*

#### Overview:

Elsbeth shared an innovative AI-powered approach being piloted in a number of Asian markets to enhance the effectiveness of face-to-face (F2F) fundraising. The project focuses on recording the initial conversations between street fundraisers and prospective donors and analysing those interactions using AI. The overarching goal is to understand — and eventually predict — long-term donor behaviour based on that very first engagement.

#### How it works:

- **Conversation Capture:** When a donor signs up via a face-to-face interaction, the conversation between the fundraiser and the donor is recorded (with consent).
- **AI Analysis:** The recordings are analysed by AI tools that look at the actual words used, the tone of voice, and other conversational dynamics.
- **Data Integration:** These early interaction insights are then linked to the donor's full lifecycle journey within the CRM, tracking key milestones such as retention, upgrade, or churn.

#### Goal:

To discover whether it's possible to predict how a donor will behave — and how valuable they may become — based on how they were spoken to during their very first interaction. The ultimate hope is to build a predictive model that links the quality or nature of the initial conversation with long-term donor outcomes.

#### Why It Matters:

This use case offers a groundbreaking approach to measuring and improving donor retention by focusing on one of the most human, but often unanalysed,



aspects of fundraising — the initial conversation. It also opens the door to:

- Improved training for fundraisers based on language and tone insights
- More personalised stewardship journeys
- Optimising F2F strategies for higher lifetime value

### Stage:

Currently in pilot phase, with results and insights still being gathered and analysed.

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### 👉 AI Use Case: Strategic Brand Collaboration and Values-Based Engagement

*Lilian Kamanzi Mugisha, Communications and Fundraising Manager at AMREF Health Africa (Uganda)*

#### Overview

Lilian shared how AMREF Health Africa leveraged AI technologies across multiple stages of a major partnership and fundraising campaign, from identifying aligned partners to co-creating personalised donor engagement strategies. The example she detailed was AMREF's recent collaboration with Absa Bank, which focused on menstrual health and hygiene.

#### 1. Using AI to Vet Potential Partners

At the very beginning of the process, Lilian explained that AI tools were used to research and analyse potential partners, including Absa Bank, to assess alignment with AMREF's mission, values, and community engagement goals. This was a critical first step to ensure credibility, shared purpose, and long-term synergy.

AI helped AMREF evaluate how Absa Bank had engaged with communities previously, what types of corporate social responsibility (CSR) initiatives they had run, and whether their brand values were authentically rooted in community-driven development. This formed the evidence base that gave AMREF the confidence to proceed with the partnership.

#### 2. Personalised Engagement Content

Once the partnership was secured, AMREF and Absa co-designed a storytelling-led campaign called "Your Story Matters", which invited women and girls to share their lived experiences around menstrual health.

AI was used here in two ways:

- To generate tailored, on-brand messaging appropriate for different audiences and demographics
- To help structure storytelling templates that would resonate with both community participants and bank customers

### 3. Data Collection, Analysis & Feedback

AI also supported AMREF in the analysis of submissions from community participants. This included thematic analysis, content clustering, and sentiment tracking, which made it easier to pull out key insights that could inform both advocacy and future programming.

The data also helped inform how the stories were presented publicly, including guidance on privacy, consent, and emotionally intelligent framing.

### Summary

Lilian's example demonstrates a holistic application of AI — not just in communications and delivery, but in the strategic foundation of partnership development. From pre-engagement research and campaign co-design to ethical storytelling and feedback integration, AI played a role in each stage of AMREF's work with Absa.

### Related Resources

- [Absa Bank](#)
  - ["Your Story Matters" campaign](#)
  - [Short video outlining the successful partnership following the first grant](#)
  - [Media article on AMREF & Absa's menstrual health campaign](#)
- 

### AI Use Case: Digital Assistant & Chatbot Integration

*Ignacio Garcia-Vaquero, Team Leader, Donor Services at SOS Children's Villages International (Austria)*

### Overview

Ignacio shared insights into two major AI tools developed and used by SOS Children's Villages International: Rafiki, a digital care assistant, and IVA, a virtual assistant/chatbot tool. Although Ignacio is not the direct product owner, he provided an overview of their function and development contexts.

### Tool 1: Rafiki – AI-Powered Digital Care Assistant

Rafiki was created in response to a clear need: 24/7 support access for SOS programme participants, particularly children, parents, and young people. Recognising resource constraints and gaps in constant staff availability, the organisation developed Rafiki to help users navigate common issues and access relevant information autonomously.

### How It Works

- Functions as a digital assistant powered by AI to handle common questions and requests
- Focuses on key areas such as care, education, and safety

- Accessible at all times, helping to alleviate dependency on human support in non-critical situations

### Key Takeaways

- The tool meets urgent needs around accessibility and scalability in participant support
- Strong example of AI supporting programme delivery, not just operational or fundraising functions

More info here: [Rafiki Overview](#)

### Tool 2: IVA – Intelligent Virtual Assistant for Donor Support

IVA supports donor engagement and services, integrating across different touchpoints to streamline and improve response times and donor satisfaction.

#### How It Works

- Built with a conversational interface (chatbot model) to answer frequently asked questions
- Provides automated support to donors for things like donation tracking, policy clarifications, etc.
- Can operate in multiple languages and time zones to accommodate SOS's international footprint

#### Key Learnings

- Designed to scale personalised donor care while easing the load on human service teams
- Offers SOS a way to explore hybrid models for support (AI + human follow-up)
- Clear focus on how AI can enhance donor stewardship — not replace it

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### AI Use Case: AI for Policy Influence & Smart Governance

*Diana Angeret, Fundraising and Communications Consultant at ToroDev (Uganda)*

#### Overview

Diana presented the work of ToroDev — a data and AI innovation think tank based in Fort Portal and Kampala, Uganda. While not directly responsible for the technical implementation, she offered key insights into how ToroDev uses data and AI for local governance, particularly through their flagship initiative DataCities.

#### The DataCities Project: Smart Cities via AI

ToroDev focuses on leveraging tech for sustainable development in areas such as healthcare, education, social justice, and economic development. Their DataCities project is an AI-driven initiative aimed at transforming municipalities into smart cities by using data to improve governance and policy-making.

### Key Features

- Uses AI to collect, analyse, and visualise data relevant to urban planning and municipal governance
- One example shared was in revenue collection: AI tools were used to analyse parking and tax collection patterns in Fort Portal, identifying inefficiencies and increasing transparency
- DataCities also supports citizen engagement by making information accessible and actionable

### Use of AI

- Enhances data-driven policy advocacy
- Enables municipalities to optimise public resource use and citizen service delivery
- Positions ToroDev as a unique actor at the intersection of civic tech, AI, and grassroots accountability

### Learn more:

- [ToroDev Organisation Website](#)
  - [DataCities Project Page](#)
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### AI Use Case: AI for Community Engagement, Security, and Organisational Support

*Engwase Banda Mwale, CEO at Zambian Governance Foundation (Zambia)*

#### Overview

Engwase Banda Mwale shared three compelling examples of how the Zambian Governance Foundation (ZGF) is experimenting with AI to enhance community outreach, staff safety, and internal effectiveness. As CEO of ZGF, she provided insights into how AI tools are starting to transform both frontline operations and back-office processes within her organisation.

#### 1. Community Engagement Through AI Language Tools

ZGF is pioneering the use of Large Language Models (LLMs), including Google's Gemini AI, to bridge the communication gap between staff and the diverse communities they serve across Zambia. One of the most persistent barriers to truly community-led development has been language — Zambia has over 70 local languages, and few staff members speak more than a handful.

To address this, ZGF has been training AI models to understand and translate up to 20

Zambian local languages, focusing not only on vocabulary but on grammatical structures and cultural nuance. Staff have been feeding example prompts into the model and refining it over time to produce more accurate and natural responses. The impact is already being felt: field teams can better understand local priorities, and reporting tools are being enhanced with sentiment analysis to capture community responses more authentically. This approach is part of a broader strategy to shift power to communities and embed their voices at the heart of development decisions.

### 2. AI-Powered Security via Microsoft Copilot

Internally, ZGF has used Microsoft Copilot to develop a custom AI system named “ZGF AI,” integrated into their Endpoint Manager to strengthen cybersecurity. One of its standout features is an automatic network isolation policy: when a device rejoins the network, the system triggers an automatic scan and isolation process until it verifies that the device is safe.

This real-time scanning guards against phishing, ransomware, and other cyber threats, dramatically reducing risk and ensuring secure remote work and collaboration. This approach represents a significant leap forward in proactive IT governance and digital resilience.

### 3. Smart Internal Platforms and AI Analytics:

Like many organisations, ZGF juggles multiple internal functions with a lean team. They are exploring AI tools to streamline processes, enhance communication, and strengthen staff wellbeing. Engwase mentioned the use of AI tools for time-tracking and leave management (including tools like [Clockify](#) and [Absentify](#)). These help managers visualise team capacity and workload, burnout risk, support remote working structures, and reduce admin time.

**Impact:** Improved internal visibility allows for better resource planning and workload balance — critical for staff wellbeing and preventing burnout.

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### AI for Environmental Research and Campaigning

*James Tennet, Senior Programme Curator at The Resource Alliance (UK)*

In his presentation to the Fundraising Innovation Action Lab, James shared a grassroots example of using AI tools to support environmental activism — specifically in a campaign to prevent the development of an Aqua Park on a local Welsh lake.

### Use of AI in Local Research and Advocacy



The campaign faced a challenge common to many local movements: how to quickly and credibly gather supporting evidence to strengthen public and political arguments. James explained how ChatGPT was used to:

- **Generate initial research leads:** AI provided a starting point for sourcing reports, studies, and arguments related to the environmental and community impact of similar water park developments elsewhere.
- **Identify recurring themes and risks:** Through prompting ChatGPT to summarise and analyse key objections raised in similar planning contexts, the team gained a clear understanding of the likely counterarguments and key stakeholder concerns.
- **Draft persuasive text:** AI was used to help shape arguments for inclusion in letters, petitions, and presentations — streamlining the advocacy process for volunteers and community members not confident in formal writing.

### How AI Amplified Impact

James emphasised that AI did not replace human insight but amplified it — enabling a small, under-resourced group of local campaigners to match the sophistication of a well-funded commercial developer. Through this approach, the team could rapidly upskill, generate materials, and build a knowledge base far beyond their original capacity.

### Broader Application for Fundraisers

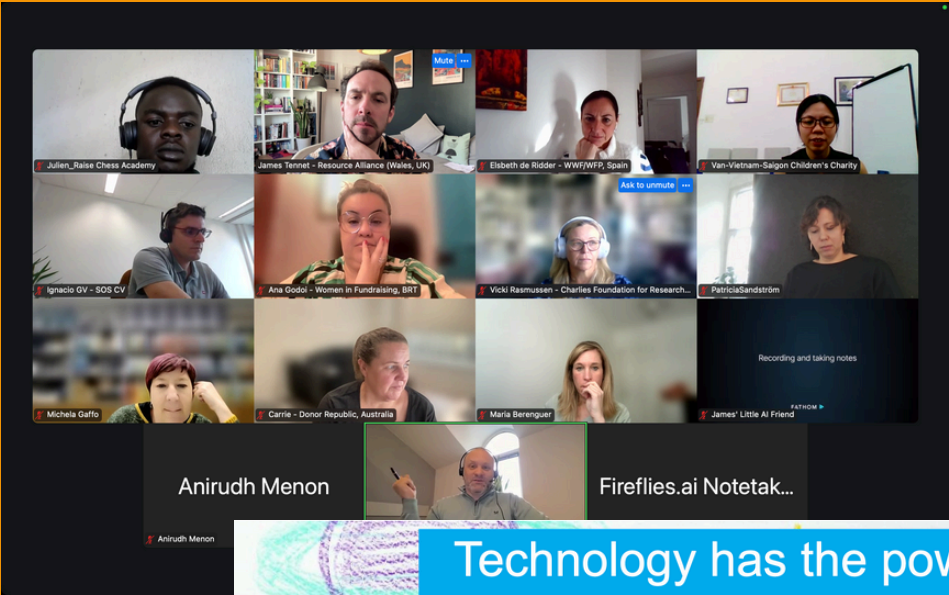
While the case was hyper-local, the implications are broad:

- **Speeding up local intelligence gathering** – AI can rapidly surface precedent, data, and persuasive arguments for fundraisers and campaigners tackling local or regional issues.
- **Empowering non-specialists** – AI levels the playing field by enabling people without legal, environmental, or technical expertise to participate more effectively in policy-influencing and advocacy.
- **Strategic messaging** – Tools like ChatGPT can help refine tone, language, and emotional appeal, making a campaign's messaging more resonant with both communities and policymakers.

James noted that this is just one example of how civil society actors can creatively deploy AI to defend spaces, protect environments, and raise community voice — and encouraged others in the Lab to think expansively about how these same tools could support their own work.



# Meeting 2 Visuals

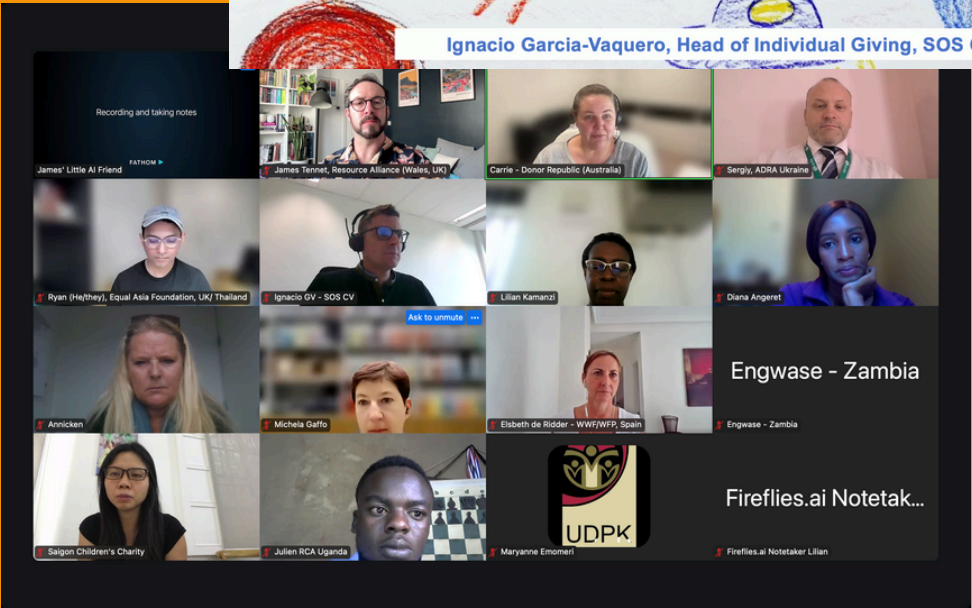


Technology has the power  
to transform lives!

**AIVA**  
Advanced intelligent  
virtual assistant

**Rafiki Chatbot**  
To support parents and  
young people

Ignacio Garcia-Vaquero, Head of Individual Giving, SOS CV International



# Meeting 3 Agenda

Time	Focus
10 mins	Scene-setting, agenda for today, recapping our main goal, confirming the desired outcomes from today
40 mins	Guest Speaker: Tash Rosenthal, Client Managing Director, DTV Group. Sharing the achievements of last year's Innovation Action Lab – focused on the ethical implementation of AI
15 mins	Quick review of organisational AI policies and guidelines from lab members
15 mins	Outline of the Elevate Network – mentoring proposal
15 mins	Wrap-up and next steps – IFC in October, final meeting in November



# Meeting 3 Outcomes

Guest Speaker; Tash Rosenthal, Client Managing Director, DTV Group  
2024 Fundraising Innovation Action Lab Key Outcomes

## Ethical AI Implementation Framework for Non-Profits – the basics

### Core Principles:

- Build trust through transparency
- Monitor & mitigate bias in AI decisions
- Keep human oversight in high-stakes tasks

### Responsible Use Cases:

- Ethical fundraising & donor engagement
- Fair volunteer matching
- Transparent disclosure of AI-generated content

### Privacy & Compliance:

- Protect personal data with anonymisation & secure handling
- Train staff on legal frameworks; run compliance audits

### Cost-Effective Strategies:

- Use partnerships & open-source tools
- Pilot AI solutions aligned with mission & budget

### Education & Capacity Building:

- Regular AI ethics training for staff
- Engage stakeholders with workshops & feedback

### Long-Term Monitoring:

- Continuous feedback & adaptation
- Regular reviews via ethics committee/officer

### Organisational AI Policy / Guideline Template

#### Introduction

Artificial Intelligence (AI) tools are transforming the way we work. They have the potential to automate tasks, improve decision-making, and provide valuable insights into our operations.

However, the use of AI tools also presents new challenges in terms of information security and data protection. This policy is a guide for employees on how to be safe and secure when using AI tools, especially when it involves the sharing of potentially sensitive company and customer information.

#### Purpose

The purpose of this policy is to ensure that all employees use AI tools in a secure, responsible and confidential manner. The policy outlines the requirements that employees must follow when using AI tools, including the evaluation of security risks and the protection of confidential data.

#### Policy Statement

Our organization recognizes that the use of AI tools can pose risks to our operations and customers. Therefore, we are committed to protecting the confidentiality, integrity, and availability of all company and customer data. This policy requires all employees to use AI tools in a manner consistent with our security best practices.

#### Security Best Practices

All employees are expected to adhere to the following security best practices when using AI tools:

- a. Evaluation of AI tools:** Employees must evaluate the security of any AI tool before using it. This includes reviewing the tool's security features, terms of service, and privacy policy. Employees must also check the reputation of the tool developer and any third-party services used by the tool.
- b. Protection of confidential data:** Employees must not upload or share any data that is confidential, proprietary, or protected by regulation without prior approval from the appropriate department. This includes data related to customers, employees, or partners.
- c. Access control:** Employees must not give access to AI tools outside the company without prior approval from the appropriate department or manager and subsequent processes as required to meet security compliance requirements. This includes sharing login credentials or other sensitive information with third parties.
- d. Use of reputable AI tools:** Employees should use only reputable AI tools and be

cautious when using tools developed by individuals or companies without established reputations. Any AI tool used by employees must meet our security and data protection standards.

**e. Compliance with security policies:** Employees must apply the same security best practices we use for all company and customer data. This includes using strong passwords, keeping software up-to-date, and following our data retention and disposal policies.

**f. Data privacy:** Employees must exercise discretion when sharing information publicly. As a first step, employees must ask themselves the question, "Would I be comfortable sharing this information outside of the company? Would we be okay with this information being leaked publicly?" before uploading or sharing any data into AI tools. Second would be to follow b) above.

### Review and Revision

This policy will be reviewed and updated on a regular basis to ensure that it remains current and effective. Any revisions to the policy will be communicated to all employees.

### Conclusion

Our organization is committed to ensuring that the use of AI tools is safe and secure for all employees and customers, as well as the organization itself. We believe that by following the guidelines outlined in this policy, we can maximize the benefits of AI tools while minimizing the potential risks associated with their use.

### Acknowledgement and Compliance

All employees must read and sign this policy before using any AI tools in the organization. Failure to comply with this policy may result in disciplinary action, up to and including termination.

By signing this policy, I acknowledge that I have read and understand the requirements outlined in this policy. I agree to use AI tools in a manner consistent with the security best practices outlined above and to report any security incidents or concerns to the appropriate department or manager.

Employee Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**Disclaimer:** *This policy template is meant to provide general guidelines and should be used as a reference. It may not take into account all relevant local, state or federal laws and is not a legal document. Neither the author nor Workable will assume any legal liability that may arise from the use of this policy.*

# Elevate Network

**Connecting emerging and established fundraisers across geographies**

***Fundraising Innovation Action Lab  
Leadership Programme 2025***







# Programme Overview

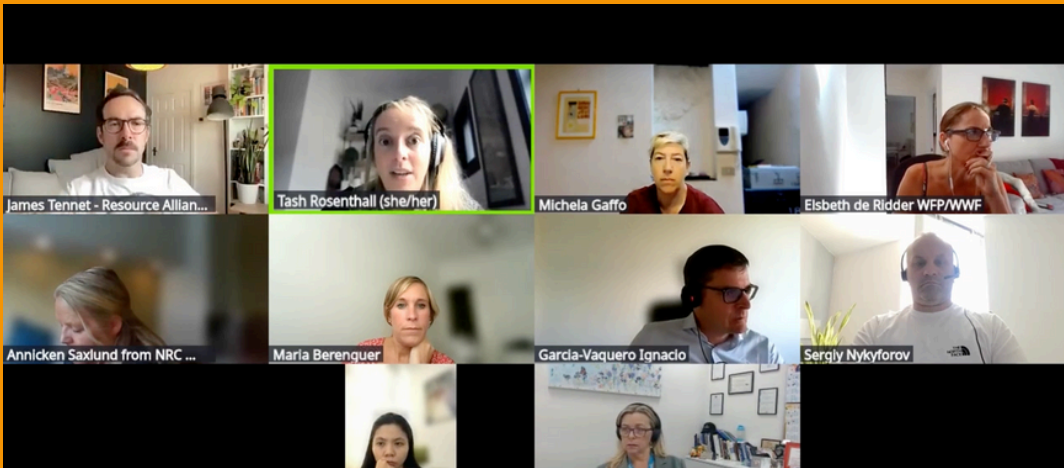
- Participants:
  - 10 Action Lab Members
  - 30 Emerging Leaders
- Duration: 12 weeks
- Time commitment: 7 hours total (35 mins per week)
- Goal: Structured support, peer learning, cross-pollination between groups and impactful takeaways for Emerging Leaders



**Proposed programme structure - to run for 12 weeks from 8 September to 28 November**

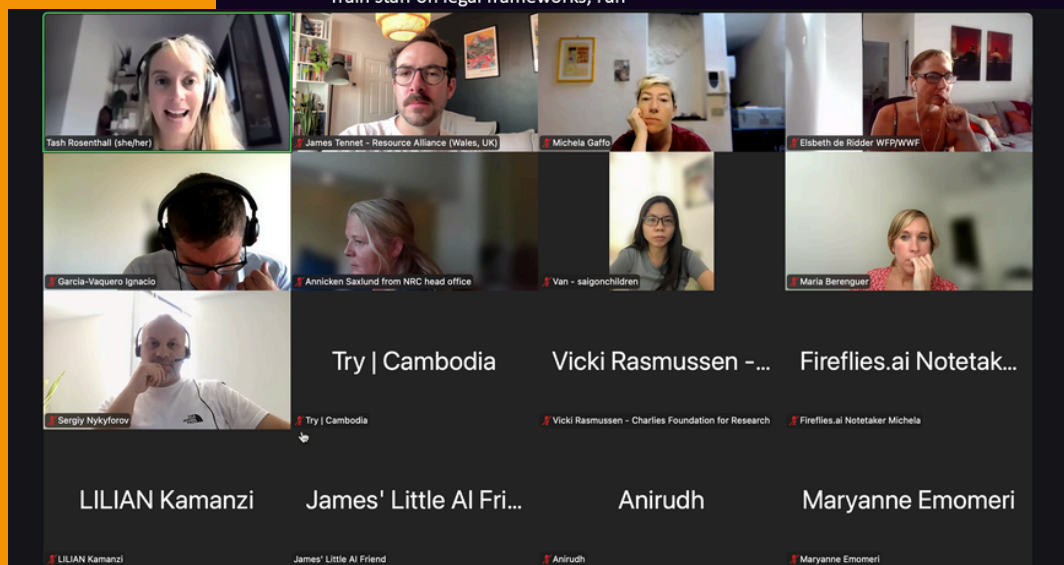
Phase	W/C	What happens	Your role	Your time (max)	RA role
Design & goal setting (Week 1–2)	8 Sep	Define programme structure and objectives	Feedback on this plan	30 mins	Prepare intake forms, set up platform group, create Emerging Leader onboarding materials
	15 Sep	Finalise offering & invite Emerging Leaders to apply	Advise on focus areas, session formats, expected outcomes	30 mins	Confirm focus areas, session formats, expected outcomes, pre-matching of individuals
Cohort recruitment & matching (Week 3)	22 Sep	Deadline for Emerging Leaders to apply, confirm matching & groups	Review Emerging Leader applicants and advise on suitable matching based on interest areas, experience, region, goals	1 hour	Curate matches, assign pods (3 Emerging Leaders per Action Lab Member), create cohort/sub-groups on platform
Engagement (Weeks 4–10)	29 Sep	3 Emerging Leaders matched with 1 Established Leader - introductions and scheduling calls for engagement period	Share your availability over coming weeks, align with 3 Emerging Leaders in your group	1 hour	Prompt discussions on GCP based on inputs from pods, archive materials/recordings
	6 Oct	One group call	Host and facilitate the group call	1 hour	Generate convo with prompt on the platform
	13 Oct	N/A - IFC week			
	20 Oct	One 1:1 session Mid-point full group exchange (optional)	Facilitate the 1:1 session	30 mins	Check in to ensure everything going smoothly Organise and facilitate the mid-point exchange
	27 Oct	One 1:1 session	Facilitate the 1:1 session	30 mins	Generate convo with prompt on the platform
	3 Nov	One 1:1 session	Facilitate the 1:1 session	30 mins	Check in to ensure everything going smoothly
	10 Nov	One group call	Facilitate the 1:1 session	1 hour	Check in to ensure everything going smoothly
Cross-pollination & reflection (Weeks 11-12)	13 Nov	End-point final group exchange	Join the final group sharing and exchange	N/A - will use our Action Lab meeting	Organise and facilitate the final exchange
	24 Nov	Lessons learnt and outcomes	Provide your insights and reflections	30 mins	Compile final report, document outputs, share resources and learnings for wider community

# Meeting 3 Visuals



## ETHICAL AI IMPLEMENTATION FRAMEWORK FOR NON-PROFITS

- **Core Principles:**
  - Build trust through transparency
  - Monitor & mitigate bias in AI decisions
  - Keep human oversight in high-stakes tasks
- **Responsible Use Cases:**
  - Ethical fundraising & donor engagement
  - Fair volunteer matching
  - Transparent disclosure of AI-generated content
- **Privacy & Compliance:**
  - Protect personal data with anonymisation & secure handling
  - Train staff on legal frameworks; run
- **Cost-Effective Strategies:**
  - Use partnerships & open-source tools
  - Pilot AI solutions aligned with mission & budget
- **Education & Capacity Building:**
  - Regular AI ethics training for staff
  - Engage stakeholders with workshops & feedback
- **Long-Term Monitoring:**
  - Continuous feedback & adaptation
  - Regular reviews via ethics committee/officer



# Meeting 4 Agenda

Time	Focus
10 mins	Introduction and scene-setting, recapping our progress
20 mins	Peer-to-peer skillshare from IFC AI sessions
45 mins	Guest speaker: Filipe Páscoa, CEO and Founder, ENLAIGHT Sharing key learning from his IFC session –Augmented AI Meets Behavioural Science
20 mins	Looking ahead: AI Use-Case Library and Elevate Network
10 mins	Round-up final thoughts, thank yous, next steps



# Meeting 4 Outcomes

## Peer-to-peer skillshare from AI-related sessions at IFC 2025

### Vicki Rasmussen insights – “AI Leadership”

Thanks everyone. I took part in the session on AI Leadership through a group called PLAI, and I want to share a few of the big ideas that really stayed with me.

What I loved about this session is that it wasn't about shiny tools or the latest gadget that promises to fix everything. It was about leadership. It was about what it means to guide a mission driven organisation through rapid change while staying very human, very grounded, and very intentional.

**The first message was simple. Mission first, always:** The organisations who use AI well are the ones who stay absolutely anchored in their purpose. AI should never lead the mission. The mission should lead how we use AI. For fundraisers, that means AI will never replace generosity or relationships. It simply helps us elevate them. It frees us to spend more time with people, not screens.

**The second theme was systems thinking:** AI isn't a plug in and pray strategy. If you want transformational change, you need to understand how the whole organisation works. Everything connects. People, culture, data, governance, donor care, the way our programs run. The session reminded me that if one part shifts, the others move too. Successful AI adoption only happens when you see the whole system, not one shiny part in isolation.

**The third key idea was Human Centered AI:** And this was strong. They talked about designing technology around people, not forcing people to bend to the technology. That means donors, staff, volunteers, clinicians, researchers, beneficiaries. Our job is to make their experience better, not colder, not more confusing, and definitely not less safe. If AI doesn't feel human, it's not working for us.

**The fourth takeaway was that leadership alignment matters more than technical skill.** We don't need to be AI experts. We need to be curious and willing to ask the right questions. One of the best prompts they gave was, “What would my first 90 days look like if I wanted my organisation to move responsibly toward AI?” Not five years. Just the first 90 days. That makes the whole thing achievable instead of overwhelming.

### **The fifth insight was building capability and awareness across the whole**

**organisation:** AI is not something that sits with the tech people or the fundraising people. It touches everything. The real shift comes from building confidence, digital literacy, and adaptability across every team. It is about teaching people how to think, not just how to press the buttons.

And connected to that is something I personally took away: we need to normalise the conversation around AI.

We need to talk about it openly, not in whispers. Not like it's something risky, secret, or reserved for specialists. The moment people feel safe to explore AI, question it, play with it, challenge it, and learn together, the fear disappears. Confidence grows. Culture shifts. If we want to be AI ready organisations, creating psychological safety around AI conversations is essential. And in our sector, openness is what builds trust with our teams and our donors.

**The sixth point was around responsible AI, trust and safety:** This is huge for nonprofits. We earn trust every day, and we can lose it quickly if we get this wrong. Responsible AI means being transparent, ethical, privacy conscious, and aware of bias. Good governance matters. Donors need to feel that we are using technology to strengthen trust, not risk it.

#### **And the final point was this:**

Interestingly, the AI roadmap comes last.  
Before strategy comes readiness.  
Before readiness comes leadership alignment.  
Before leadership alignment comes mindset and culture.  
Only when those foundations are strong do you sit down and draw the roadmap.  
It's practical. It's human. And honestly, it's achievable.

#### **So in summary, what I took away from this workshop is this:**

- AI leadership is not about the technology.
- It is about mission, mindset, and people.
- It is about building an organisation that can adapt with confidence, stay grounded in purpose, and keep humanity at centre while the world keeps shifting around us.

And I think that's a space where fundraisers and nonprofit leaders can really shine.

### Peer-to-peer skillshare from AI-related sessions at IFC 2025 Carrie Fletcher insights – “Reducing Donor Friction with AI”

Carrie shared notes from the IFC session on “**Reducing donor friction with AI**”, which focused on using AI to improve the supporter experience and conversion.

#### Start with the “why” of your AI use

Carrie highlighted the importance of articulating a clear AI “why” – just as organisations define their overarching mission:

- In the session, the presenters emphasised that you shouldn’t start with shiny tools; start by asking: “What problem are we trying to solve for donors?”
- For the organisations featured, their “AI why” was framed in relational terms – e.g. “using AI to deepen human connection with donors.”

She shared two memorable examples of org-level “AI whys”:

- “**Harness AI for radical connection**” – using technology to strengthen the relationship between donors and the cause.
- “**Harness AI to improve donor wellbeing**” – from SPCA BC (Canada), where AI was explicitly positioned in service of donor love and donor wellbeing, drawing on Adrian Sargeant and Jen Shang’s work.

These examples kept the donor at the centre, not the tech.

#### Donor friction: mapping and reducing it

The session and Carrie’s reflection emphasised:

- **Donor friction** (especially in online giving) is often about confusing journeys, too many steps or unclear asks.
- **AI can support the process** (e.g. through better segmentation, personalisation or recommendations) but you should first fix the basics – forms, copy, flows – and then layer AI on top.
- 

#### She mentioned techniques like:

- Using gift amounts or “gift areas” grounded in donors’ giving history, rather than random numbers.
- Using AI-powered tools to test different variants and increase conversion.
- Applying segmentation and journey optimisation so donors feel seen and understood.

**A key takeaway:** AI should amplify what already works in good fundraising practice, not replace strategic thinking.

### Transparency and alignment with values

Carrie linked the session back to themes from Vicki's piece: Tools must be chosen in line with the organisation's AI "why" and overall values.

- Transparency with donors about any AI use is important – people should never feel tricked or misled.
- Without that clarity, time and money can easily be wasted on tools that don't really serve donors or the mission.

**Peer-to-peer skillshare from AI-related sessions at IFC 2025**  
**Filipe Páscoa – AI, Behavioural Science and Human-Centred Innovation**

**Background and approach**

Filipe introduced himself as:

- A long-time friend of the Resource Alliance and IFC speaker.
- Former fundraising director for Amnesty International (Portugal) and SOS Children's Villages (Brazil), with around 15 years' experience in front-line fundraising leadership.
- Now running his own company working at the intersection of **AI assistants and social data intelligence**.

He positioned himself as someone who has moved from being "in the trenches" to helping organisations use AI and data in very practical, grounded ways.

**"We don't need to know everything" – JOMO, not FOMO**

A striking theme in his talk was the idea of **JOMO – the Joy of Missing Out**:

- There are more than **20,000 AI solutions** out there; nobody can (or should) try to know them all.
- Seeing AI "gurus" doing everything with prompts can make people feel like they're missing the train.
- Filipe argued for letting go of that pressure: you can be effective without chasing every new capability.

For Filipe, this is psychologically important for fundraisers and leaders who are already stretched, and helps reduce anxiety around AI.

**AI is more than ChatGPT: combining different types of AI**

Filipe stressed that what most people call "AI" is just **one part** of the picture:

- Large language models (LLMs) like ChatGPT are powerful, but they're only one category.
- There are also tools for **classification, prediction, recommendation, social listening, automation**, and more.
- The real value often comes from **combining these capabilities** – for example:
  - Using machine learning models to analyse supporter data;
  - Connecting them to messaging platforms (e.g. WhatsApp flows);
  - Then layering a conversational interface for supporters and staff.

He shared examples from his practice where messaging flows, AI assistants and social listening are woven together to improve fundraising and engagement.

**Bringing behavioural science and nonviolent communication into AI**

One of Filipe's most exciting ideas was the opportunity to **embed expertise we normally can't afford into AI assistants**:



- Behavioural economists, decision scientists, neuroscientists and nonviolent communication (NVC) experts are rarely on staff in nonprofits.
- But we can **train AI assistants not just with instructions, but with knowledge** – research, books, frameworks, examples.
- Then, when we ask the AI to draft messages or journeys, we can tell it to:
  - “Consider the needs of the other person, not just our organisational needs.”
  - Apply principles of donor wellbeing, empathy and perspective-taking.

For Filipe, this is a potential game-changer for fundraising and public engagement: AI can help us communicate in a more respectful, empathic, “human” way at scale, grounded in solid science rather than guesswork.

### Human-centred, not AI-centred

Throughout, he echoed the earlier theme that **AI should augment, not replace, humans:**

- AI can play the role of a silent teammate – a behavioural scientist or NVC expert “in the room” when drafting communications.
- But humans still make the final calls, hold the relationships, and define what ethical and responsible use looks like.

He also noted the risk of “AI enthusiasts” in organisations:

- People who enthusiastically upload documents and try tools without any sense of risk can inadvertently create problems.
- This underlines the need for **governance, policies and training**, not just experimentation.

### Offers to continue supporting the group

Filipe closed by:

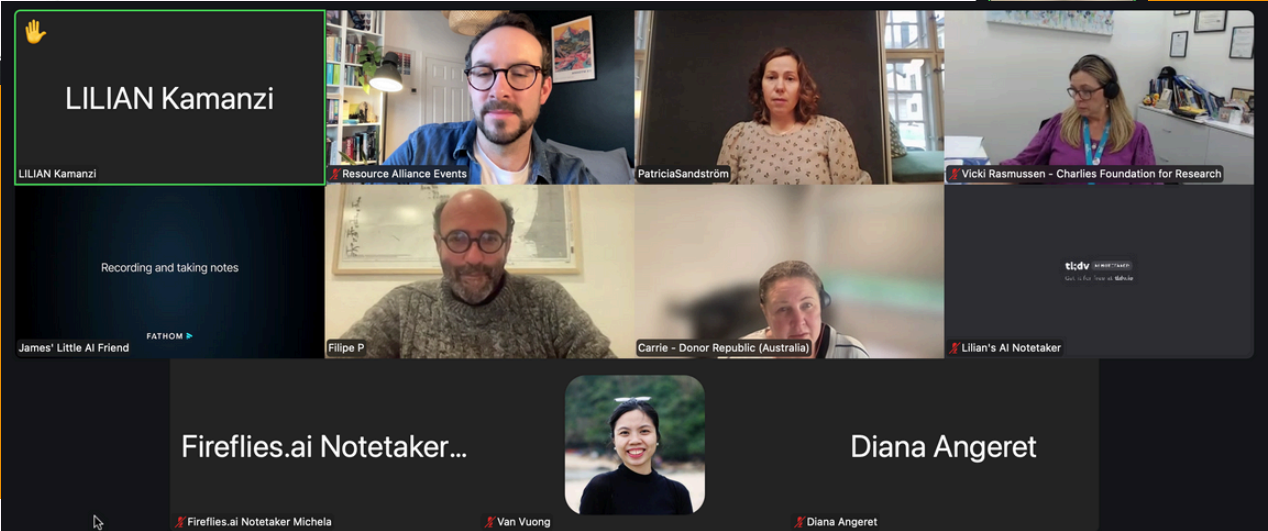
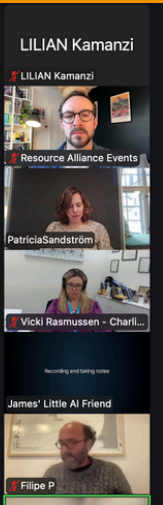
- Mentioning that he’s developed **AI glossaries and materials** on combining behavioural economics, decision science and AI.
- Inviting participants to connect with him on LinkedIn so he can share those resources.
- Encouraging people to start small, be realistic, and use AI thoughtfully rather than trying to do everything at once.

# Meeting 4 Visuals

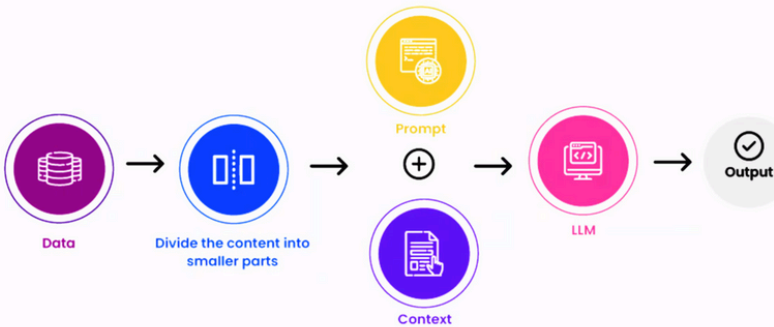
Reducing Donor Friction with AI

## 7 Key Elements to Audit in Your Giving Experience

- 1. Simplicity of the Donation Form
- 2. Clear Giving Options
- 3. Personalization & Relevance
- 4. Acknowledgement & Gratification
- 5. Trust & Transparency
- 6. Predictive & Supportive Features
- 7. Donor Retention Pathways

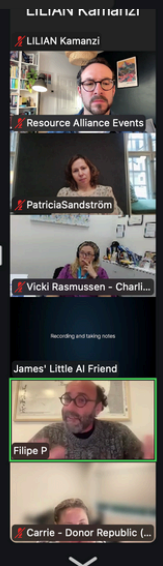


## RAG Explained Simply



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# Conclusion & Next Steps

The 2025 Fundraising Innovation 2 Action Lab has delivered strongly against the goals set at the start of the year, building practical foundations for how the Resource Alliance community can adopt AI in ways that are ethical, effective, and inclusive. The group's work has combined real-world peer learning with a clear emphasis on accessibility and good governance, ensuring the outputs are useful for organisations at very different levels of confidence and capacity.

A central achievement of the Lab was the development of an AI Use Case Library through shared examples from across the group, showing how AI is already being applied in fundraising and organisational practice. These case studies reflect a consistent theme: AI can increase speed and capability, but it must be guided by human judgement, clear values, and appropriate safeguards, particularly when trust, privacy, and storytelling are involved.

The Lab also strengthened the "how" of responsible adoption by drawing on the tools developed by the 2024 Innovation Action Lab on ethical AI implementation. This work has informed the creation of internal organisation policies and guidelines for ethical AI use in the non-profit sector. Together, these resources support leaders and teams to move beyond experimentation and towards confident, principle-led implementation.

Alongside the AI work, the Lab co-designed the Elevate Network mentoring pilot concept to address equity and capacity in the sector by connecting experienced fundraisers with emerging leaders through structured mentoring and shared learning. While the network has not yet been implemented, the Lab has produced a clear, feasible plan for the Resource Alliance to take forward through the RA Global Community platform.

The next phase is to shift from creating and collating resources to embedding them across the wider community. The Resource Alliance will take forward dissemination of the AI Use Case Library and progress the Elevate Network plan, while Lab participants will harness learnings from this year to develop their own organisational policies and guidelines for ethical AI use. Together, these steps will ensure the Lab's work becomes of active, practical value to the wider sector.



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