



**2024 Leadership Programme**

**Innovation**

**Action Lab 1**

**Report**

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# Introduction

The Resource Alliance Leadership Programme 2024 was co-designed with the 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 2024 programme consisted of four full-group Leadership Summits and six smaller-group Action Labs addressing the topics our community of leaders told us mattered the most to them right now – Innovation, Strategy & People, Climate, and Shifting Power.

The Action Lab covered in this report is Innovation (Group 1). Over the course of the year, this group met four times online (2-hour meetings) and once in-person for those attending IFC 2024.

In the first Action Lab meeting, the participants used an online Miro board to share the areas of 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 2024 Innovation 1 Action Lab

## VISION – What is our shared dream?

This Lab is our collective response to adapting and thriving in transformational times by leveraging innovation to future-proof our organizations. It aims to empower each participant as a "future-focused leader," equipped to navigate and influence complex challenges through innovative solutions, particularly enhancing fundraising strategies. The vision focuses on preparing leaders to not only anticipate but also shape the future by fostering a proactive, creative, and technologically savvy organizational culture.

### GOALS

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

**Identify and Collate Global Examples of Innovation (through a fundraising lens):**  
Focus on strategic areas of sustainable fundraising, highlight the organisational culture and Board Management decisions that create the conditions for innovation.

**Develop and Implement an 'Innovation Readiness Survey' in Fundraising:**  
The output from the survey will help identify strengths and gaps at individual, leadership and organisational levels that help develop the innovations potential in fundraising.

**Cultivate a Culture of Innovation:**  
Establish actionable guidelines for fostering an innovation culture within various sizes and types of non-profit organizations.

**Enhance Knowledge Sharing:**  
Create a resource base of innovative fundraising models/ frameworks | case examples – as inspiration/ reference materials for the RA network

### STRATEGIES

What important choices do we make to realise the vision?

**Buddy System for Continuous Engagement:** Implement buddy or small group systems to maintain momentum between meetings and facilitate practical application of discussed innovations.

**Leverage External Expertise:**  
Invite speakers from innovative companies to share insights and behind-the-scenes looks at building innovation cultures and product development.

**Simplified and Focused Approach:**  
Concentrate on a selected few innovations that offer the most significant potential impact on fundraising, borrowing and adapting strategies from commerce sector.

**Document Development and Iteration:**  
Utilize collaborative tools (e.g., shared docs) to develop the toolkit and other resources collectively, allowing for real-time updates and contributions.

### MEASUREMENTS

How do we measure our progress once the action areas are identified?

**Surveys for Impact Assessment:**  
Conduct before and after surveys for lab meetings 3 & 4 to gauge participants' confidence and readiness to apply the learned strategies, aiming for high positive responses.

**Progress Tracker:**  
At the end of the year, evaluate progress on defined goals in this Framework, based on the collective feedback from the group.

**Failures and Lessons Learned Session:**  
Integrate discussions on what strategies didn't work and why, fostering a culture of learning from failures.

**Final Review and Presentation:**  
Organize a session in the final meeting to review the survey and other outputs, presenting them to the larger Lab community for feedback and evaluation.

### ACTIONS

Meetings scheduled to pursue goals

**Action Lab Meeting 1**  
Wed 24 April  
08:00 – 10:00 BST

**Action Lab Meeting 2**  
Wed 26 June  
08:00 – 10:00 BST

**Action Lab Meeting 3**  
Wed 11 Sept  
08:00 – 10:00 BST

**IFC In-Person Meeting**  
TBC

**Action Lab Meeting 4**  
Tue 19 Nov  
08:00 – 10:00 GMT

# Executive Summary

This report goes 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: Identify and Collate Global Examples of Innovation (through a fundraising lens)**

Four key case studies of fundraising-related innovation were shared by Lab Members in the second meeting and have been documented for further sharing on pages 6-12 of this report

## **Goal 2: Develop and Implement an 'Innovation Readiness Survey' in Fundraising**

This was the main tangible action-orientated goal of this group and was developed throughout the year. The final version of this survey can be found on pages 23-26 of this report, and will be implemented in 2025

## **Goal 3: Cultivate a Culture of Innovation**

In the third meeting, a guest speaker was specifically invited as an expert on *creating a culture of innovation*. The main takeaways from that presentation are detailed on pages 13-18 on this report

## **Goal 4: Enhance Knowledge Sharing**

This goal was covered by every Action Lab meeting throughout the year, and this report is the culmination of the knowledge gathered and now ready to be shared with a wider audience.

# Meeting 2 Agenda

Time	Focus
20 mins	Sharing final version of the Action Framework with time for group members to share thoughts and feedback.
45 mins	Innovation examples / case studies from group members: <ol style="list-style-type: none"> <li>1. Diana Ruano (UNHCR) – Reimagining Fundraising</li> <li>2. Cath Hoban (CARE Australia) – Global Radicals Fundraising program</li> <li>3. Usha Menon – Blockchain for donor data management</li> <li>4. Doel Jaikishen (YUVA India) – ComplexCity</li> </ol>
20 mins	Discuss our goal to develop and implement an ‘Innovation Readiness Survey’, time for questions & suggestions from group
20 mins	Breakout groups to discuss the innovation case studies that were shared earlier and consider: <ul style="list-style-type: none"> <li>• Why was that innovation allowed/able to happen?</li> <li>• What facilitates innovation?</li> <li>• What might be holding innovation back?</li> <li>• What are the key themes of innovative orgs?</li> <li>• What organisational culture allows for innovation?</li> </ul>
15 mins	Introduce ‘homework assignment’ between now and the next Action Lab on 11 September. In smaller working groups, we will undertake research tasks to report back in the next meeting.

# Meeting 2 Outcomes

## Case Study 1: Reimagining Fundraising Presented by: Diana Ruano & Cath Hoban

### Summary:

Reimagining Fundraising is a global initiative aimed at fundamentally transforming how fundraising is approached, using innovative tools, cross-sector collaboration, and technology. The initiative has been developed with input from experts in various fields, incorporating insights from industries such as fintech and corporate sectors to inspire a new generation of fundraising.

In this presentation, several innovative case studies were shared to highlight creative approaches and emerging trends in the fundraising sector. Below are the key points and case studies covered.

### Key Innovations and Examples:

#### 1. Crowdsourcing and Cross-Sector Innovation

- **Summary:** The project embraced a crowdsourcing approach, gathering innovative ideas from a wide array of industries and sectors, not just from the non-profit world. By opening up the discussion to corporate, tech, and marketing industries, the project was able to generate new perspectives that challenge traditional fundraising approaches.
- **Example:** One of the successful examples was the integration of mobile and digital payment systems for easy donor transactions. This was a cross-industry collaboration with fintech companies, which allowed organizations to explore and adopt newer, faster, and more accessible payment methods for donations.

#### 2. Personalization through AI and Data Analytics

- **Summary:** The initiative recognized the growing importance of personalization in donor communications, driven by data analytics and AI. AI tools were discussed as a way to automate and personalize outreach based on donors' past behaviors and preferences.
- **Example:** Several non-profits shared how they used AI-driven communications to send targeted messages to donors, leading to increased donor retention. One organization saw a 25% increase in donor retention after implementing AI to analyze donor data and tailor outreach efforts accordingly.

### 3. Exploring New Digital Fundraising Channels

- **Summary:** The rise of digital payment channels was highlighted, with a particular emphasis on cryptocurrency donations and the potential these new channels hold for engaging a younger, tech-savvy audience.
- **Example:** One case study highlighted a co-branded fundraising campaign between a non-profit and a major corporate partner, which involved social media promotion, TV ads, and live events. This approach greatly expanded the reach of the campaign, and the corporate partner's audience became key supporters of the non-profit cause.

### 2. Adopting Blockchain for Transparency

- **Summary:** Blockchain technology was presented as a way to increase transparency in fundraising. By using blockchain, donors could trace their donations in real time and see exactly how their funds were being used, increasing trust and accountability.
- **Example:** A pilot initiative using blockchain technology allowed donors to track their contributions in a disaster relief fund, showing how each dollar was allocated and providing unprecedented transparency.

#### Impact:

The Reimagining Fundraising project is helping non-profits adopt future-ready strategies by encouraging them to step outside their comfort zones and embrace new, innovative tools and platforms. This initiative is transforming how fundraising is done, making it more adaptable and sustainable in a rapidly changing digital world.

#### Learning Points

- Collaboration across sectors leads to innovative and fresh ideas that challenge the status quo.
- Leveraging AI and digital channels can significantly improve donor engagement and retention.



## Case Study 2: Pledge for Change Presented by: Cath Hoban

### Summary:

Pledge for Change is a values-driven initiative designed to promote greater **transparency, accountability, and equity** in fundraising. The pledge encourages organizations to build donor relationships based on trust, transparency, and ethical partnerships. Non-profits signing the pledge commit to equitable and ethical practices, particularly in how they engage with local communities and manage funds.

### Key Insights:

#### 1. Ethical Fundraising

The initiative encourages non-profits to prioritize transparency in their donor communications. By committing to showing how funds are being used in real-time, Pledge for Change aims to build stronger, trust-based relationships between non-profits and their supporters.

- **Example:** Non-profits that signed the pledge implemented real-time reporting for their donors, showing exactly how and where the money was spent.

#### 2. Equitable Collaboration:

A key component of Pledge for Change is the commitment to equitable partnerships, particularly with grassroots organizations and local communities. By redistributing power and decision-making, the pledge seeks to ensure that those closest to the issues have a strong say in how projects are funded and executed.

- **Example:** Local community leaders were involved in the decision-making process of a fundraising campaign, ensuring that their voices were heard in how resources were allocated.

### Impact:

Pledge for Change has helped reshape how non-profits approach donor relationships, fostering trust and long-term partnerships. By emphasizing transparency and equitable collaboration, non-profits that have adopted the pledge are building more sustainable, values-driven funding models.

### Learning Points:

- Ethical, transparent practices build trust and sustainability in donor relationships.
- Involving local communities in decision-making fosters equity and shared ownership of projects.

## Case Study 3: Blockchain & AI in Fundraising Presented by: Usha Menon

### Summary:

Usha Menon's case study on Blockchain and AI in fundraising highlighted the potential of these emerging technologies to revolutionize the non-profit sector. These technologies are being used to build trust and transparency while improving donor engagement and efficiency.

### Key Insights:

#### 1. Ethical Fundraising

Blockchain technology offers a secure, transparent ledger that allows non-profits to track donations in real time. Donors can see exactly where their money goes and how it is being used, which fosters trust and ensures that funds are being handled responsibly.

- **Example:** Blockchain platforms enabled donors to trace their donations during disaster relief campaigns, providing visibility from donation to impact.

#### 2. AI for Donor Personalisation:

AI tools allow non-profits to analyze donor behavior and preferences, enabling personalized engagement and communications. AI can help non-profits predict future donor behavior and tailor campaigns accordingly.

- **Example:** AI-powered campaigns have been shown to improve donor retention rates by 30% through personalized emails and targeted communications based on donor data.

### Impact:

By integrating blockchain and AI into their operations, non-profits are able to provide greater transparency and improve donor engagement, leading to more trust and accountability. These technologies offer scalable solutions that empower non-profits to optimize their fundraising efforts.

### Learning Points:

- Blockchain can build trust with donors by providing real-time transparency and accountability.
- AI-driven personalization enhances donor engagement and retention by providing tailored experiences.

## Case Study 4: ComplexCity Presented by: Doel Jaikihen

### Summary:

ComplexCity is a platform that engages local communities in solving urban challenges through crowdsourcing and data-driven solutions. The platform connects stakeholders, including governments, businesses, and citizens, to co-create innovative solutions for complex urban problems.

### Key Innovations:

#### 1. Crowdsourcing Community Solutions

ComplexCity empowers local communities by enabling citizens to propose and vote on solutions to urban issues like transportation, waste management, and housing. This democratizes the decision-making process, ensuring that the voices of those directly affected are heard and implemented.

- **Example:** In one city, citizens proposed and voted on transportation solutions, leading to an increase in public engagement and a more effective transportation system.

#### 2. Data-Driven Decision Making:

The platform uses data analytics to monitor the effectiveness of proposed solutions, enabling city planners and governments to adjust their strategies in real-time based on feedback.

- **Example:** Data from citizen feedback helped optimize waste collection routes, leading to a 20% reduction in costs while improving service efficiency.

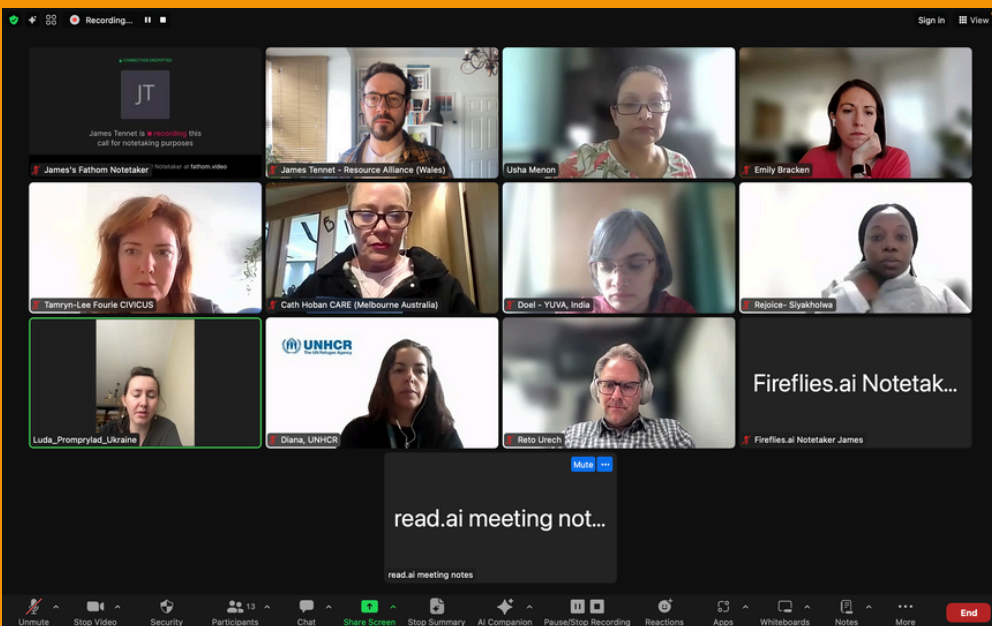
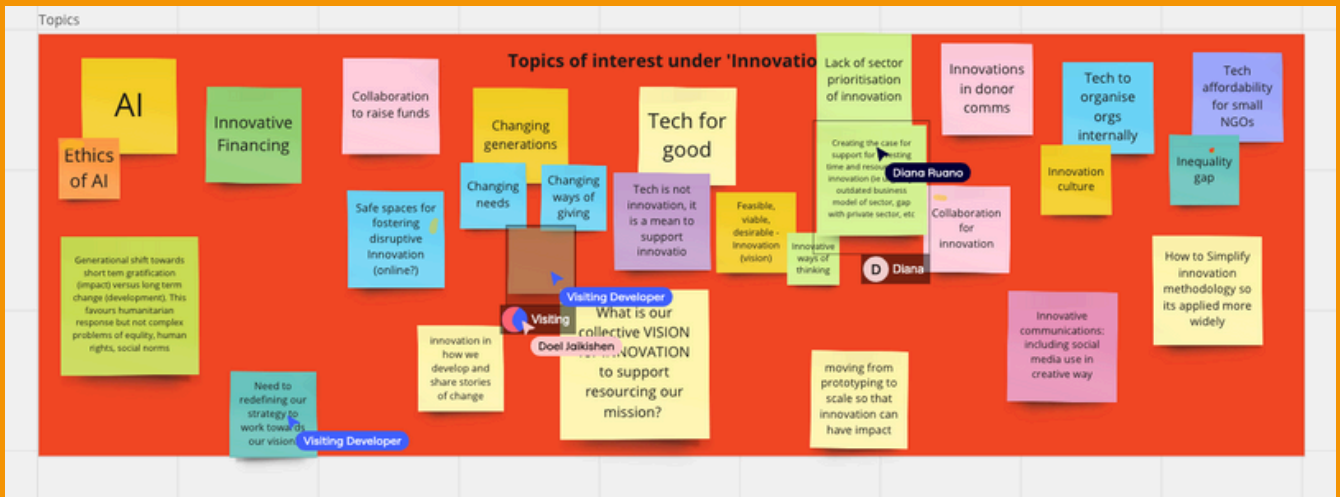
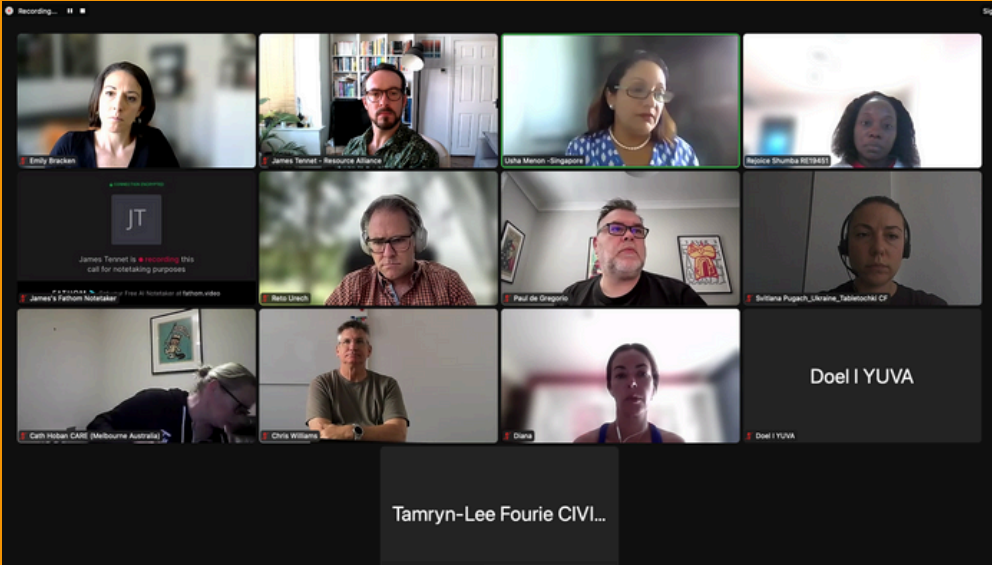
### Impact:

ComplexCity has demonstrated the power of community engagement in urban planning. By crowdsourcing ideas from citizens and using data to refine solutions, the platform has created a model where urban solutions are driven by the people most impacted by the issues.

### Learning Points:

- Crowdsourcing solutions from local communities ensures that urban challenges are addressed in ways that reflect the needs of the population.
- Data-driven insights enable continuous improvement of urban services, making them more efficient and responsive.

# Meeting 2 Visuals



# Meeting 3 Agenda

Time	Focus
30 mins	Reporting back from the sub-groups on their homework task – drafting versions of suggested Innovation Readiness Questionnaires
20 mins	Next / final steps in developing Innovation Readiness Questionnaire.
30 mins	Keynote talk from <u>Eleanor Gibson</u> , Innovation Coach at Tilt on <i>Creating the right culture and mindshifts for innovation</i>
20 mins	Open Q&A with Eleanor Gibson
15 mins	Wrap-up and next steps – IFC in October, final meeting in November

# Meeting 3 Outcomes

## Keynote Talk: Creating a Culture of Innovation

Eleanor Gibson, Founder, Tilt

### Summary:

Eleanor started her career as a community fundraiser, then led innovation projects at Cancer Research UK and Plan International. Her focus has since evolved into coaching organizations to build innovative cultures through her company, Tilt.

The primary goal of this presentation is to discuss how organizations can shift their internal culture to become more innovative and adaptable, particularly in the non-profit sector.

### Mindset Shifts Required for Innovation:

Eleanor highlighted **five key mindset shifts** that organizations must adopt to cultivate a culture of innovation. These mindset shifts provide the foundation for building a more dynamic, adaptive, and creative working environment.

#### 1. From Outputs to Outcomes:

- Eleanor emphasized the importance of focusing on outcomes rather than just outputs. Organizations often get caught up in the activities (outputs) they need to do rather than focusing on the difference they want to make (outcomes).
- **Key Insight:** It's vital to identify what success looks like in terms of real-world impact, not just the completion of tasks. If teams focus solely on deliverables, they miss out on opportunities to be innovative.
- **Practical Example:** Cancer Research UK shifted their goals to outcomes-based metrics, allowing teams more freedom to innovate. They focused on why a project was needed and left space for the how to evolve creatively.

#### 2. From Hierarchies to Networks:

- Innovation thrives in organizations where information flows freely across teams and hierarchies. Eleanor urged organizations to move away from rigid hierarchical structures toward more networked, cross-functional teams that are diverse in skills and perspectives.
- **Practical Example:** At Amnesty International UK, the communications team embraced this mindset shift by working in agile sprints. They brought together team members from video production, magazine production, and digital marketing.

This cross-functional team worked together in daily stand-up meetings, allowing to share ideas and solve problems quickly and collaboratively.

- **Key Insight:** Cross-functional collaboration fosters innovation by integrating diverse perspectives, reducing silos, and allowing ideas to develop across different parts of the organization.

### 3. From Controlling to Empowering:

- Innovation often gets stifled in organizations with rigid, top-down control. Eleanor advocated for a shift towards empowering individuals at all levels to make decisions and take risks.
- **Key Insight:** Leaders should adopt a coaching approach rather than a directive one. They should ask questions, model vulnerability, and create an environment where failing is part of the learning process.
- **Practical Example:** At Refuge, the CEO adopted a coaching leadership style, actively encouraging team members to take ownership of their ideas. This trust and empowerment led to a more engaged and innovative workforce.

### 4. From Predicting to Experimenting:

- Eleanor argued that in today's fast-paced world, it's impossible to predict the future with certainty. Instead, organizations need to embrace a culture of experimentation and rapid testing.
- **Key Insight:** Break down large projects into smaller, testable components and run quick, inexpensive experiments to learn and adapt. This reduces risk and increases confidence in the ideas being developed.
- **Practical Example:** The team at Children First wanted to launch a new fundraising product but had many unknowns. Instead of launching a full-scale campaign, they ran a series of quick, small experiments to test different aspects of the idea. This iterative approach helped them refine their strategy and ultimately launch a successful product.

### 5. From Isolation to Transparency:

- Organizations often operate in silos, with teams working in isolation from one another. Eleanor emphasized the need to work out in the open, sharing progress and challenges as they arise. This transparency encourages collaboration, new ideas, and continuous improvement.
- **Practical Example:** At Amnesty International UK's human rights education team, team members previously worked in isolation on their projects. By introducing regular team check-ins and shared workspaces, they began to innovate more effectively as ideas were shared and developed collectively.

- **Key Insight:** Working transparently, both internally and externally, enables teams to learn from one another and reduces the risks of working in isolation.

### Practical Tools for Innovation:

#### 1. Constructive Rants:

- Eleanor introduced the idea of a constructive rant as a tool to identify barriers to innovation. This involves pairs or groups sharing frustrations about what is getting in the way of innovation in their work.
- **Example Exercise:** Participants were encouraged to "rant" for two minutes about the obstacles to innovation they faced in their organizations. Their partners' role was to listen and encourage more venting by asking, "What else?" Afterward, they reflected on what changes they'd like to see.

#### 2. Agile Practices:

- Eleanor promoted the use of agile methodologies such as daily stand-ups and retrospectives to foster transparency and continuous improvement. These practices create opportunities for regular reflection, learning, and course correction.
- **Example:** Daily stand-up meetings where team members quickly share progress, roadblocks, and next steps can help teams stay aligned and identify opportunities for innovation.

#### 3. Design Sprints:

- Design sprints were mentioned as an intense, focused period of time where teams work together to develop new ideas. This structured process helps teams rapidly prototype and test new concepts in a short period.
- **Example:** Cancer Research UK used design sprints to bring together staff from different parts of the organization to develop a new fundraising initiative. By combining expertise from diverse areas, they were able to quickly prototype and refine their ideas.

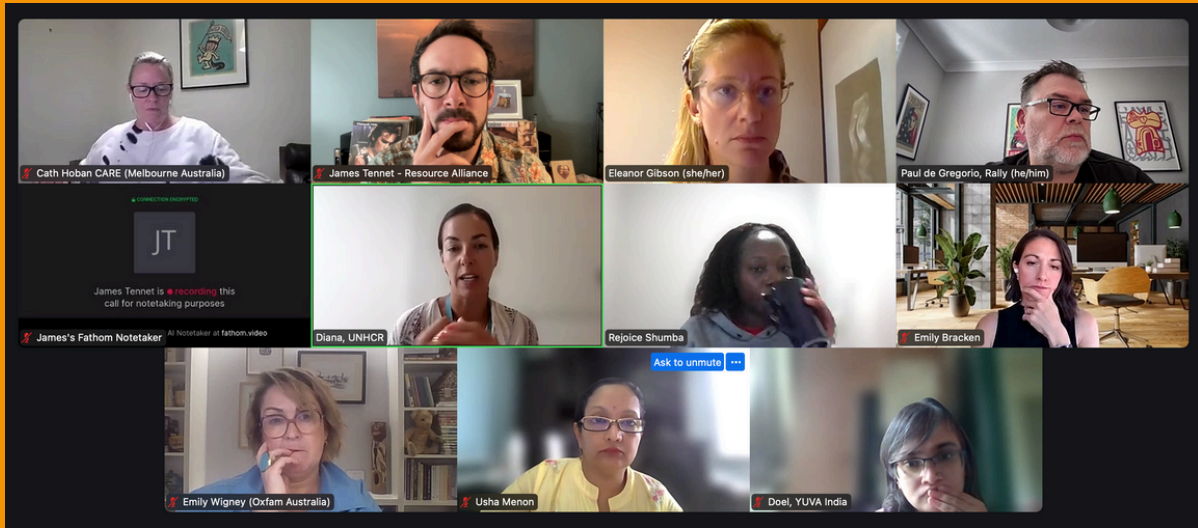
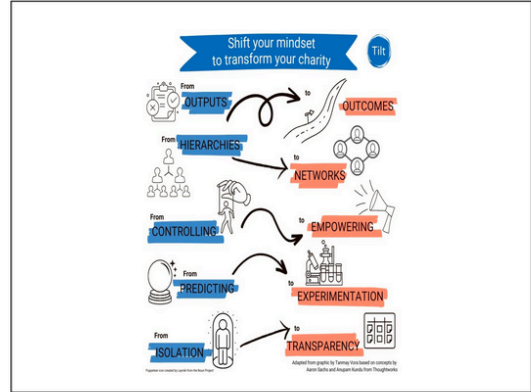
### Key Takeaways:

- **Focus on Outcomes, Not Outputs:** By shifting from a task-oriented approach to focusing on the bigger impact, organizations can create space for innovation to thrive.
- **Create Cross-Functional Teams:** Innovation happens when diverse perspectives come together. Organizations should break down silos and encourage collaboration across teams and departments.



- **Empower Team Members:** Trusting individuals to make decisions and take risks leads to more engaged and creative teams. Leaders should adopt a coaching mindset.
- **Experiment and Learn:** Rather than trying to predict the future, organizations should adopt a test-and-learn approach, running small experiments to quickly gather insights and improve.
- **Work Transparently:** Sharing progress and challenges in real time encourages collaboration and helps ideas develop more quickly.

# Meeting 3 Visuals



## Eleanor Gibson Charity innovation and agile coach



Eleanor coaches leaders and organisations to:

- Create an innovation culture which enables a step-change in innovation.
- Consistently and confidently build new propositions without outsourcing to agencies.
- Embed tools and approaches to create change and continue to innovate independently.
- Deliver more value in less time using agile ways of working.

Key experience:

- Led a cross-functional team to develop, build and launch a digital product to extend the life cycle of the flagship £24m+ 'sponsor a child' product at Plan International UK.
- Has coached fundraising teams at 20+ UK charities including [Cancer Research UK](#) to apply design thinking, lean and agile tools to unlock fundraising growth.
- 10+ years of charity fundraising experience.

*"The work you have done with us has been a complete transformation and exceeded my expectations in terms of improving ways of working and beyond. Thanks to you we have exceeded all our key targets."*

[Carmen Barlow, Head of Communications, Amnesty UK](#)

# Meeting 4 Agenda

Time	Focus
30 mins	Keynote talk from <u>Daniele Fusi</u> , Managing Director at <u>Metadonors</u> , on integrating AI, chatbots, and phygital innovations to enhance human connection in fundraising
20 mins	Open Q&A with Daniele Fusi
30 mins	Review and make final adjustments to Innovation Readiness Questionnaire
15 mins	Next steps and long-term vision with the Innovation Readiness Questionnaire
15 mins	Reviewing our progress this year against the Action Framework, final thoughts and thank yous

# Meeting 4 Outcomes

## Keynote Talk: Using AI to Enhance Human Connection in Fundraising Daniele Fusi, Managing Director, Metadonors

### Overview and Context:

Daniele Fusi, Managing Director of Metadonors, provided a focused session on the integration of AI into fundraising practices. Drawing from his extensive experience as a former fundraising director and now as a technology innovator, he discussed the transformative role of AI in reducing repetitive tasks and enhancing donor experiences while maintaining the critical human element.

### Key Points from the Talk

#### AI's Role in Fundraising: Efficiency and Empowerment

- **Core Argument:** AI is not intended to replace human fundraisers but to assist them by automating repetitive and time-consuming tasks. This allows human teams to focus on creativity, strategy, and donor relationships.
- **Efficiency Example:** AI tools can reduce email response time by 90%, freeing human resources for higher-value activities.
- **The Chihuahua Counting Analogy:** Used to demonstrate how AI excels at tasks requiring rapid data processing but still relies on human oversight for nuanced, emotional, or creative interactions.

#### The Donor-Centric Approach in a Multi-Channel World

- **Challenges Identified:** Donor interactions now span various platforms (e.g., WhatsApp, email, social media), making it harder to maintain consistency and personalization.
- **Solution:** Metadonors developed a donor experience platform powered by generative AI. This platform integrates all communication channels, creating a unified donor journey regardless of the entry point (e.g., email, WhatsApp).

### AI-Driven Solutions

#### 1. Generative AI for Donor Interactions:

- Automates initial communication, including responses to common queries.
- Identifies complex queries and routes them to human agents for resolution.
- Achieves consistency across platforms while minimizing human effort.

## 1.Reducing Human Workload:

- For example, responding to donor emails can take between 1 to 15 minutes for a human but mere seconds with AI.
- AI agents handle first-level interactions and escalate nuanced cases to human agents.

## 2.Tools for Fundraising:

- QR code-based campaigns that initiate WhatsApp conversations, where AI agents engage donors with quizzes and personalized follow-ups.
- Smart donation boxes that facilitate physical and recurring donations, integrated with data collection and automated follow-ups.

## 3.Impact Metrics:

- AI tools improved donor conversion rates by 20-25% in certain telemarketing campaigns, attributed to enhanced data accessibility for human agents.

## Integration Challenges

- **Organizational Readiness:** Successful AI adoption requires clear workflows, robust training for staff, and leadership buy-in.
- **Data Systems:** A robust CRM remains essential. The future may see CRMs evolving into data lakes, allowing AI to extract and utilize insights efficiently.

## Ethical Considerations

- Emphasized transparency in donor interactions, ensuring stakeholders understand when AI is involved.
- Maintained the importance of preserving the “human touch” in critical donor interactions.

## Alignment with Innovation Action Lab Goals:

Daniele’s talk provided actionable insights directly relevant to the Innovation Action Lab's focus on **innovation readiness**:

- 1.**Practical Application:** Demonstrated how AI can address operational challenges, improve efficiency, and enhance donor engagement.
- 2.**Scalable Tools:** Showcased adaptable technologies (e.g., donation boxes, AI agents) that align with varying organizational needs and capacities.
- 3.**Ethical Integration:** Reinforced the importance of using AI responsibly, balancing technological capabilities with the human element essential in the nonprofit sector.

These insights can inspire Lab members to integrate innovative tools thoughtfully while preparing their organizations for long-term, ethical AI adoption.

# Meeting 4 Visuals

## IFC2024

Enhance human connection in fundraising

Daniele Fusi  
Managing Director Metadonors


metadonors



### Chihuahua or muffin?



### AI is going to empower human connection



- Customer Service Operators + AI for Back Office operations
- First-level support for conversations via Email and WhatsApp
- Human operator enhanced by Generative Artificial Intelligence
- Optimized service to manage customer interactions quickly and efficiently
- Focus on handling repetitive and routine tasks, allowing operators more time for higher-value activities
- Generative AI provides suggestions and automation, improving the quality and speed of responses

metadonors

IFC2024



Recording and taking notes

FATHOM - Get your AI transcription of fathom videos

James's Fathom Notetaker

# Innovation Readiness Questionnaire

This survey has been developed by the Innovation Action Lab running as part of the Resource Alliance 2024 Leadership Programme.

Our intention is to gather data that will reveal the state and level of innovation across our sector as a whole. The Resource Alliance intends to develop a report based on these findings with a view to repeating on an annual basis.

Organisations participating in the survey will also receive the report, as well an overall score on their own Innovation Readiness and scores for the different areas of innovation covered in the survey. This will reveal where their organisation is performing positively and negatively in terms of innovation and how they compare to the sector averages, providing valuable insights for improving their own innovation readiness.

We encourage you to pre-read the questions in this PDF before beginning the survey and discuss with relevant colleagues to gain a wider organisational perspective before entering your responses.

Please note this questionnaire should take 15 minutes to complete, and any individual or organisational identifying data collected will be kept confidential.

## **Personal questions (will all be kept confidential)**

Your name

Your job title

Your organisation

Where are you based

## **Initial open-ended questions:**

1. What is your understanding of innovation?
2. What is driving innovation at your organisation?
3. What will innovation help your organisation achieve?

## Organisational data questions

### Organisation type

INGO

NGO

Social enterprise

Agency

Consultancy

Other (more options first?)

### Organisation cause (can select multiple) – charities only

Poverty relief

education

religion

health

emergency/crisis relief

community development

the arts

human rights

civil rights and equality

environment

animal welfare

other (can specify)

### Size of organisation (staff)

0 – 10 / 11 – 50

51 – 100 / 101 – 250

251 – 500 / 501 – 1000

1001 – 5000 / 5001 – 10000 / 10000+

### Size of organisation (annual fundraising income) – charities only

Under \$500,000 / \$500,000 – 1 million

1 million – 5 million / 5 million – 10 million

10 million to 50 million / 50 million to 100 million

100 million to 250 million / 250 million to 500 million / 500 million+

### Grade from one to five using the following criteria (rating scale for next pages)

1. Strongly Disagree / Not at All / Very Poor

2. Disagree / Slightly / Poor

3. Neutral / Moderately / Fair

4. Agree / Mostly / Good

5. Strongly Agree / Completely / Excellent



SECTION	AREA	SCORE	%
Section 1: Mindset & Culture	The organisation actively encourages and supports new ideas	1	20%
	Employees feel empowered to take risks and experiment with new ideas	2	40%
	Innovation is a valued aspect of our organisational culture	3	60%
	Failure from innovation efforts is treated as a learning opportunity rather than a setback	4	80%
	The organisation regularly celebrates and recognises successful innovations	5	100%
<i>Subtotal example</i>	<i>Max score in each section is 25</i>	<i>15</i>	<i>60%</i>
Section 2: Resources & Funding	The organisation allocates a sufficient budget to support innovation activities.		
	There are dedicated teams or roles focused on driving innovation.		
	The resources (time, funds, personnel) available for innovation projects are adequate		
	The organisation invests in training and development to enhance innovation capabilities		
	The organisation leverages external funding or partnerships to support innovation		
Section 3: Leadership & Strategy	There is a clear and communicated strategy for innovation in the organisation		
	Innovation is regularly discussed in leadership meetings and considered of high value in decision-making		
	Leadership are open to constructive feedback across teams/department		
	Leadership and the Board provide adequate resources to support innovation efforts		
	The leadership and the Board demonstrate a strong commitment to fostering a culture of innovation		

SECTION	AREA	SCORE	%
Section 4: Systems & Processes	Existing processes and systems effectively support innovation efforts		
	There are established processes for idea generation, development, and implementation		
	The organisation uses technology effectively to drive innovation		
	The infrastructure supports rapid prototyping and experimentation		
	The organisation has efficient methods to scale successful innovations		
Section 5: Collaboration & Partnerships	The organisation frequently collaborates with external partners on innovation projects		
	These collaborations are effective in driving meaningful innovation		
	The organisation has strong relationships with stakeholders that support innovation efforts		
	Internal collaboration between departments supports the innovation process		
	The organisation is open to ideas and practices from outside its immediate environment		
Section 6: Measurement & Data Insights	The organisation has clear metrics in place to gather data and measure the success of innovation efforts		
	Innovation outcomes are regularly evaluated and reviewed		
	The impact of innovation on organisational goals is significant		
	The organisation learns from past innovation efforts to improve future outcomes		
	Success stories of innovation are documented and the data is shared openly within the organisation		

30 questions total – Max OVERALL score is 150

# Conclusion & Next Steps

This Innovation Action Lab has successfully delivered on its ambitious goals set out at the start of the year, through a deep fostering of collaboration and knowledge sharing among sector leaders.

The Lab's meetings featured inspirational keynote talks, such as Eleanor Gibson's exploration of fostering a culture of innovation and Daniele Fusi's presentation on ethical AI implementation in fundraising. These talks offered actionable strategies that Lab members can apply to their organizations, such as adopting agile methodologies, focusing on cross-functional collaboration, and utilizing AI to improve efficiency while preserving the human touch.

Members shared and examined global case studies demonstrating innovative approaches in fundraising and organizational culture. These examples, such as the Reimagining Fundraising initiative and ComplexCity, provided valuable learning points, showcasing how leveraging data, cross-sector collaboration, and emerging technologies can drive impactful solutions.

The Lab collaborated to design an industry-first Innovation Readiness Questionnaire that assesses the state of innovation readiness across the social impact sector. This tool promises to not only benchmark innovation practices but also empower organizations with actionable insights to enhance their capabilities.

The Innovation Readiness Questionnaire is set to launch in early 2025, with distribution to organizations across the social impact sector.

While the Lab's meetings have concluded, its legacy continues through the resources created, including detailed documentation of case studies and insights from guest speakers. These materials will be shared with the broader Resource Alliance network, further expanding the Lab's impact.

By creating actionable tools, fostering sector-wide collaboration, and promoting continuous learning, this Innovation Action Lab has laid a strong foundation for driving transformational change.

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