



**2024 Leadership Programme**

**Innovation**

**Action Lab 2**

**Report**

# Table of Contents

---

<b>03</b>	<b>—</b>	<b>Introduction</b>
<b>04</b>	<b>—</b>	<b>Action Framework</b>
<b>05</b>	<b>—</b>	<b>Executive Summary</b>
<b>06</b>	<b>—</b>	<b>Meeting 2</b>
<b>16</b>	<b>—</b>	<b>Meeting 3</b>
<b>22</b>	<b>—</b>	<b>Meeting 4</b>
<b>26</b>	<b>—</b>	<b>Ethical AI Implementation Framework for Non-Profits</b>
<b>29</b>	<b>—</b>	<b>Conclusion &amp; Next Steps</b>
<b>30</b>	<b>—</b>	<b>Acknowledgements</b>

# 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 2). 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 2 Action Lab

## VISION – What is our shared dream?

This Lab aspires to transform participants into future-ready leaders who can confidently utilise and champion innovative technologies and strategies, particularly AI, to advance their organisations. By focusing on ethical, sustainable innovation, this Lab aims to empower leaders to drive systemic change and creatively address the evolving challenges in fundraising and non-profit management. We aim to not just adapt to change but to lead it, ensuring our organisations are proactive, resilient, and equipped to utilize innovation for social good.

### GOALS

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

**Develop Deep Understanding of AI’s Potential and Challenges:**  
Focus on ethical implications, biases, and environmental impacts. Explore AI applications that can bridge social inequalities and enhance fundraising efforts.

**Development of a Comprehensive Toolkit:**  
Compile a toolkit that includes best practices, case studies, and actionable strategies for fostering ethical implementation of AI within nonprofit organizations.

**How can we use AI to trigger systemic change in fundraising?**

### STRATEGIES

What important choices do we make to realise the vision?

**Participant led group discussions:** Using member experiences to learn & develop approaches to test moving forward

**Expert Engagement and External Insights:** Integrate insights from thought leaders and innovators outside the nonprofit sector to bring fresh perspectives and successful strategies into discussions.

**Foster a Culture of Ethical Innovation:** Develop guidelines and frameworks to safely integrate new technologies. Normalize the adoption of innovation as a core strategy in fundraising, going beyond technological implications to include strategic and systemic changes.

**Knowledge Sharing and Capacity Building:** Establish mechanisms for continuous learning and sharing of innovations, successes, and failures.

### MEASUREMENTS

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

**Pre and Post Surveys:**  
Conduct surveys to measure shifts in participants’ confidence and competence in implementing innovative strategies and using AI.

**Toolkit/guide/summary doc Utilization and Feedback:**  
Track the adoption and effectiveness of the toolkit following lab sessions, feedback survey, and case studies of implementation.

### ACTIONS

Meetings scheduled to pursue goals

**Action Lab Meeting 1**  
Thu 2 May  
15:00 – 17:00 BST

**Action Lab Meeting 2**  
Wed 26 June  
15:00 – 17:00 BST

**Action Lab Meeting 3**  
Wed 25 Sept  
15:00 – 17:00 BST

**IFC In-Person Meeting**  
TBC

**Action Lab Meeting 4**  
Wed 27 Nov  
16:00 – 18:00 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: Develop Deep Understanding of AI's Potential and Challenges**

This goal was achieved through deep learning from the three expert guest speakers who delivered keynote talks in meetings 2, 3 and 4, and the case studies of AI-related innovation that were shared by Lab Members in the second meeting. All of this has been documented in the following report.

## **Goal 2: Development of a Comprehensive Toolkit**

This report itself constitutes a comprehensive AI toolkit for the non-profit sector, and will be shared with the full Resource Alliance Global Community.

## **Additional Goal: Develop and Share an Ethical AI Implementation Framework for Non-Profits**

This additional goal was organically developed as the group began to focus specifically on the ethical implications of AI. They decided that a framework to give non-profits key pointers on how to ethically implement this new technology into their work would be highly valuable for the sector. The Ethical AI Implementation Framework for Non-Profits can be found on pages 27-29 of this report.

# Meeting 2 Agenda

Time	Focus
5 mins	Present and align around vision and goals
30 mins	Keynote talk from Josh Hirsch, Senior Consultant at Soukup Strategic Solutions, Inc. on Ethical implementations of AI in fundraising
20 mins	Open Q&A with Josh Hirsch
30 mins	Innovation learnings and case studies from Lab Members: <ul style="list-style-type: none"><li>• Saleem Tejani, Head of Digital at DTV Group</li><li>• Johann Fox, Head of Development at Dogs Trust Ireland</li><li>• Paula Attfield, CEO at Stephen Thomas Ltd.</li><li>• Jon Eserin, Assistant Director – Public Fundraising &amp; Mass Engagement at RSPCA</li></ul>
30 mins	Open Q&A with case study presenters

# Meeting 2 Outcomes

## Keynote Talk: Ethical AI Implementation

Josh Hirsch, Founder, The AI Dude

### Introduction and Background:

- Josh Hirsch emphasized the necessity for non-profit organizations to embrace AI as a tool, not just for the future but for the present. He made clear that AI is not something to be feared but understood, particularly in terms of how to use it ethically and efficiently to improve operations.
- He shared insights from his experience in fundraising, digital marketing, and social media, drawing on examples from his work at Susan G. Komen and various other organizations.

### Key Points of the Presentation

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. Ethical Framework for AI Usage:

- Josh discussed the importance of creating an AI usage policy to ensure that ethical guidelines are in place. He stressed the need to have a clear set of rules for using AI, particularly around data privacy and generative AI (creating content or visuals using AI).
- **Example:** He gave a hypothetical situation where AI could be used to create anonymous visuals to protect clients, such as in domestic abuse cases, without revealing identities.

#### 2. Challenges with Generative AI:

- There was a focus on how generative AI (like creating images or content from text prompts) might blur ethical boundaries. Josh discussed how AI-generated content should be handled, specifically questioning whether organizations need to disclose that AI was used to create the content.
- **Key Insight:** AI can help generate content, but organizations need to decide whether this should be transparent to the audience. For instance, in cases where privacy is crucial, AI can replace traditional images with ethical alternatives..

### 13. Bias in AI Systems:

- Josh addressed bias in large language models (LLMs), which are trained on vast amounts of internet data. He emphasized that biases in AI models can inadvertently perpetuate stereotypes or misrepresentations.
- He shared an example where AI generated a sentence about a "matching gift opportunity" for a fundraising letter, though there wasn't actually a matching gift available – demonstrating how AI's bias toward certain fundraising patterns can introduce errors.

### 4. Data Privacy & Security:

- Josh emphasized the need for organizations to adopt strict data security protocols when using AI. This includes anonymizing sensitive donor information when it's entered into AI systems. For example, instead of inputting an individual's full name and address, organizations could use coded donor identifiers.
- **Key Insight:** AI can help segment and personalize donor outreach, but it's crucial that personal information is anonymized for privacy protection.

### 5. Benefits of AI for Non-Profits:

- AI provides the opportunity for **increased efficiency** by handling repetitive tasks like drafting emails, reports, or letters, allowing staff to focus on more strategic tasks.
- **Predictive AI:** Non-profits can use AI for **data modelling**, to identify patterns in donor behaviour and predict future trends. This can enhance fundraising campaigns by improving targeting and donor engagement.
- **Sentiment Analysis:** AI can also be used to perform sentiment analysis on feedback and survey responses, helping non-profits understand how their supporters feel about the organization's work.

### Takeaway for the Innovation Lab:

Josh's presentation provided a comprehensive framework for **ethical AI use** within non-profits, focusing on the importance of AI policies, transparency, and data protection. For the lab's goal of creating a comprehensive toolkit, his emphasis on ethics and creating guidelines can serve as a foundational element for the toolkit, helping organizations navigate AI implementation responsibly.



### Interactive Survey Game on Ethical AI Saleem Tejani, Head of Digital, DTV Group

Saleem introduced the group to an interactive survey-game designed to simulate the decision-making processes involved in ethical AI implementation. The game was used as an educational tool to highlight the complex trade-offs that organizations face when trying to implement AI responsibly.

#### Key Points & Insights:

- **Decision-Making in AI:** Saleem emphasized how ethical AI implementation often involves choosing between conflicting priorities, such as **efficiency vs. fairness** and **automation vs. human oversight**. The game demonstrated that there is no “one-size-fits-all” approach to ethical AI, but instead, each organization must carefully weigh the trade-offs.
- **Ethical Dilemmas:** The game presented players with scenarios where they had to choose between using AI in ways that might compromise **privacy** or introduce **bias**, versus decisions that might limit the efficiency or scalability of the AI.
- **AI Policy Development:** Saleem’s exercise helped emphasize the importance of organizations developing **clear ethical guidelines** for AI use. This is especially critical in the non-profit sector, where trust and transparency are essential to maintaining donor relationships.

#### Takeaway for the Innovation Lab:

This case study showed that ethical AI decisions require **ongoing dialogue** and a **framework** for decision-making that includes trade-offs. For the lab, Saleem’s exercise highlighted the importance of creating **tools and exercises** to help non-profits make informed, ethical decisions about AI implementation.

### Case Study 1: AI for Donor Insights Paula Attfield, CEO, Stephen Thomas Ltd

Paula shared how her organization, Stephen Thomas LTD, is using AI to gain deeper insights into donor behaviour and preferences. The AI tools allowed the organization to conduct more targeted and effective fundraising campaigns by analysing large datasets.

#### Key Points & Insights:

- **Predictive AI:** Stephen Thomas LTD used **predictive AI** to forecast donor behaviour, helping the organization predict when donors were likely to increase their giving or stop donating altogether. These predictions allowed the organization to adjust its strategies to retain donors and improve donor loyalty.
- **Challenges with Data Privacy:** Similar to Johann's presentation, Paula discussed the challenges of handling large amounts of donor data while ensuring it was used ethically. She highlighted the steps her organization took to anonymize and protect data to comply with privacy laws.
- **Actionable Insights:** AI helped Paula's team gather actionable insights from their donor data, such as identifying trends in giving patterns and optimizing campaign timing based on historical donor behavior.

#### Takeaway for the Innovation Lab:

Paula's case study underscored the value of **predictive analytics** in fundraising, but also the need for **data governance policies** to ensure donor privacy is maintained. The toolkit should include detailed guidance on using **AI-powered donor insights** while prioritizing **ethical data handling**.

## Case Study 2: Integrating AI Across Organizational Functions Presented by: Jon Eserin, Assistant Director – Public Fundraising & Mass Engagement, RSPCA

### Summary:

Jon highlighted how the RSPCA has begun integrating AI across various organizational functions to improve efficiency, enhance decision-making, and support innovation in their operations.

### Key Points:

#### 1. AI in Brand Research

- AI was utilized during a recent rebranding effort to gather and analyze qualitative feedback from diverse audience segments.
- Enabled rapid interrogation of data related to brand imagery, visuals, and messaging, leading to a more effective and inclusive rebranding process.

#### 2. Content Classification and Communication:

- The communications team used AI tools like Gemini to classify and reduce content for press and media purposes.
- These tools helped streamline processes, saving time and ensuring consistent messaging.

#### 3. "The Brain" Project:

- RSPCA is developing a centralized AI-driven knowledge base called "The Brain."
- This resource consolidates years of advice and content, supporting their inspectorate, prevention arm, and supporters with accessible, actionable information.
- The AI system is part of a digital transformation effort to provide better resources for internal teams and supporters.

#### 4. Personalization in Donor Engagement:

- AI is being integrated to build models for "next best actions," enhancing donor communications by delivering the right message to the right person at the right time.
- This approach leverages extensive datasets to optimize donor engagement strategies.

### 1. AI for Administrative Efficiency:

- Jon shared a practical example of using ChatGPT for tasks like creating board papers and drafting business cases.
- The tool has proven effective in reducing time spent on repetitive administrative tasks, freeing staff for more strategic activities.

### Discussion Highlights:

- **Adopting an "AI-First" Mindset:**
  - Participants discussed the importance of embedding an "AI-first" critical thinking approach across organizational workflows.
  - Staff are encouraged to first consider how AI might assist with a task before defaulting to traditional methods.
  - This cultural shift mirrors previous transitions like "digital-first" or "mobile-first" approaches in the nonprofit sector.
- **Challenges in Behavioral Change:**
  - Jon and participants acknowledged the difficulty of driving behavioral change among staff who may default to familiar processes.
  - Suggestions included creating visual reminders or incorporating prompts into daily workflows to encourage AI utilization.

### Takeaways for the Action Lab:

1. **AI as a Strategic Enabler:** Jon's examples demonstrated how AI can enhance operational efficiency, donor engagement, and knowledge sharing.
2. **Cultural Shift:** Emphasizing an AI-first mindset will require sustained efforts to shift organizational culture and behavior.
3. **Practical Application:** AI tools like ChatGPT and Gemini can provide immediate value in streamlining tasks and improving communication.

### Case Study 3: Ethical AI in Fundraising Johann Fox, Head of Development, Dogs Trust Ireland

Johann shared a case study from Dogs Trust Ireland, focusing on how AI has been integrated into their fundraising operations to improve donor engagement, campaign efficiency and volunteer management while maintaining ethical standards.

#### Key Points & Insights:

- **AI for Personalization:** Johann explained how AI was used to personalize donor communications, which resulted in increased engagement and improved fundraising outcomes. However, they faced the challenge of ensuring that the AI-driven communications didn't come across as too impersonal or invasive.
- **Bias and Inclusion:** A major challenge Johann discussed was mitigating bias in the AI algorithms. Dogs Trust Ireland worked to ensure that their AI models didn't inadvertently exclude or target certain groups based on biased data.
- **Data Privacy:** Johann emphasized the importance of protecting donor privacy when using AI. Dogs Trust Ireland anonymized sensitive data when feeding it into AI systems, a step that was crucial for maintaining trust with their donor base.
- **Volunteer Management:** AI is transforming the organization's ability to recruit, manage, and retain volunteers, ensuring a better alignment between the needs of the organization and the expectations of its supporters:
  - **Volunteer Matching:** AI tools are used to match volunteers to roles based on a range of factors, including skills, preferences, and availability. This approach significantly enhanced the efficiency of the recruitment process and reduced mismatches that had previously contributed to high volunteer turnover.
  - **Ethical Challenges and Fairness:** The RSPCA invested in regular audits to ensure the algorithms did not inadvertently favor certain demographics or exclude volunteers due to irrelevant factors.
  - **Improved Volunteer Retention:** AI analysis provided insights into why volunteers stayed or left. This data allowed the organization to proactively address common challenges, such as creating a sense of value and belonging among volunteers, leading to a noticeable improvement in retention rates.
  - **Scalability and Resource Optimization:** By automating routine tasks like role matching and onboarding, the AI systems freed up human resources to focus on more strategic aspects of volunteer management, such as training and engagement.

#### Takeaways for the Innovation Lab:

Johann's case study illustrated the benefits of AI in donor personalization and

fundraising, but also the ethical considerations around bias and data privacy. For the toolkit, it's essential to include strategies for ethical data management and bias mitigation in AI systems. Johann's detailed sharing of using AI for volunteer management underscored the potential of AI to enhance human resource management within non-profits, particularly in areas like volunteer engagement. The presentation provided actionable insights for the Lab, emphasizing the importance of integrating ethical considerations into AI systems to ensure they foster inclusivity and equity.

### **Overall Takeaways from Meeting 2 Case Studies for the Innovation Lab:**

These case studies provide real-world examples of AI implementation in non-profit contexts, each addressing the balance between innovation and ethics. Key elements to incorporate into the comprehensive toolkit include:

- Ethical decision-making frameworks to help organizations weigh trade-offs when implementing AI.
- Guidelines on data privacy and protection, ensuring that AI systems respect donor, volunteer, and client confidentiality.
- Methods for mitigating bias in AI algorithms, ensuring fairness and equity in AI-driven decisions.
- Practical tools and exercises (such as Saleem's interactive game) to help non-profits navigate ethical dilemmas in AI use.

# Meeting 2 Visuals

The Resource Alliance logo and tagline "Democratizing access to knowledge" are in the top left. The main slide text reads: "WELCOME EVERYONE! Innovation Lab 2 Session 2 15.00 – 17.00 (BST) \*THIS MUSIC WAS AI GENERATED Prompt – 'Innovative Fundraising Music'". A grid of 12 participant video thumbnails is on the right, including James's Fathom Notetaker, James Tennet - Resource..., Tash Rosenthal (she/her), Josh Hirsch, MS, Elisa NOVOA, ancaluca, Sal Tejani (DTV), Johann Fox, Jon Eserin, Paula, and Kellie Ellis, Can....

A "Recording" indicator is at the top left. The grid of participants includes James's Fathom Notetaker, James Tennet - Resource Alliance, Tash Rosenthal (she/her), Josh Hirsch, MS, Elisa NOVOA, ancaluca, Sal Tejani (DTV), Johann Fox, Jon Eserin, Salvatore Salpietro, Kellie Ellis, Canadian Red Cross, Paula Attfield (she/her) ST, Enock AJAYI, Shoni Field she/her, and AÇEV-Asu Sanem Kaya.

The main video shows a "SPOTLIGHT SESSION" with "Josh Hirsch" on stage in a dimly lit room. The Resource Alliance logo is in the bottom left. The participant grid on the right includes James's Fathom Notetaker, James Tennet - Resource..., Tash Rosenthal (she/her), Josh Hirsch, MS, Elisa NOVOA, ancaluca, Sal Tejani (DTV), Johann Fox, Jon Eserin, Salvatore Salpietro, Kellie Ellis, Canadian..., Paula Attfield (she/her), Enock AJAYI, and AÇEV-Asu Sanem Kaya.

# Meeting 3 Agenda

Time	Focus
<b>30 mins</b>	Keynote talk from Nathan Chappell, Co-Founder at Fundraising.AI on Ethical & Practical Implementation of AI in the Non- Profit Sector
<b>30 mins</b>	Open Q&A with Nathan Chappell
<b>35 mins</b>	Group discussion & sharing on the key priorities/pain points we are facing in our organisations regarding implementation of AI
<b>15 mins</b>	<p>Next steps:</p> <ul style="list-style-type: none"> <li>• How an ethical implementation of AI toolkit/roadmap could help us address the key pain points just shared</li> <li>• Using our time together at IFC (plus final online meeting in November)</li> <li>• Open Discussion session at IFC with AI sector leaders</li> </ul>



# Meeting 3 Outcomes

## Keynote Talk: Ethical & Practical Implementation of AI in the Non-Profit Sector Nathan Chappell, Co-Founder, Fundraising.AI

Nathan Chappell, from **Fundraising.AI**, provided an insightful presentation focused on the ethical and practical implementation of AI in the non-profit sector, with a focus on fundraising. His presentation centered around several key points:

### The Need for Responsible AI in Fundraising:

- **Generosity Crisis:** Nathan began by discussing the decline in **charitable giving** in developed nations, particularly in the U.S. He cited that the percentage of U.S. households participating in charitable giving has dropped by **16%** over the last 20 years, and if trends continue, charitable giving could fall into the **single digits** in a few decades.
- **AI's Role:** While AI has contributed to many of the challenges non-profits face, Nathan emphasized that **AI is also the only scalable solution** to reverse this decline. However, he stressed that AI must be implemented **responsibly** and **ethically**.

### Beneficial AI for the Non-Profit Sector:

- Nathan explained that the **non-profit sector** operates on a unique **currency of trust**. Therefore, non-profits have the added responsibility of ensuring that AI mitigates harm rather than creating unintended negative consequences.
- **Long-Term Ethical Considerations:** He drew a comparison between AI and **social media**. Social media started as a community-building tool but has had long-term detrimental effects, including increased anxiety and depression. Similarly, AI must be used cautiously to avoid future harm.

### AI Use Cases in Non-Profits:

Nathan discussed various **AI applications** in the non-profit sector, emphasizing both **predictive AI** (which analyzes data to make predictions about donor behavior) and **generative AI** (which creates content or automates certain tasks). Some examples include:

- **Predictive AI:** Helps identify donor patterns, such as **donor retention**, **gift forecasting**, and **donor engagement**. Predictive AI can help non-profits efficiently allocate resources and target the right donors.

- **Generative AI:** Nathan highlighted the power of **generative AI** for creating personalized content. It can automate tasks like **content creation** (e.g., writing fundraising letters, grant applications), saving time and allowing non-profits to focus on strategic efforts.

### Challenges of AI in Fundraising:

- **Bias and Manipulation:** Nathan warned of the ethical dilemma around the use of AI, particularly in avoiding manipulative tactics. He posed a critical question: "What is the difference between asking for a donation and manipulating someone to give?". AI's efficiency at predicting donor behavior might lead to concerns about using those insights in ways that manipulate donors rather than engage them ethically.
- **Human Element in Fundraising:** Nathan was adamant that while AI can enhance fundraising efforts, human connection is still essential. He shared insights into how the brain responds to human interactions, such as eye contact, suggesting that automation shouldn't replace human engagement completely.

### Building an AI Framework:

Nathan emphasized the importance of developing an **AI framework** that includes guidelines on:

- **When and how to use AI**
- **Long-term implications** of AI use in non-profits
- **Transparency** in communicating with donors about the use of AI
- Ensuring that the framework prioritizes **ethical considerations** and **mitigates harm**.

### Takeaway for the Innovation Lab:

Nathan's talk provided a solid foundation for the lab's goal of developing a comprehensive AI toolkit for non-profits. His focus on **responsibility, transparency, and long-term implications** aligns with the group's goals. The toolkit must include **ethical frameworks** and **best practices** to ensure AI is used beneficially in the non-profit sector.

### AI Implementation Organizational Priorities and Pain Points (Miro Board)

The group used a Miro board to gather their thoughts on their organizations' current priorities and pain points regarding AI implementation.

#### Key Themes Shared on the Miro Boards:

##### Education and Awareness:

- Many participants highlighted a lack of knowledge within their organizations regarding the potential and limitations of AI. Education was cited as a major barrier to AI implementation, as staff members are often unsure of how AI can be effectively integrated into their work.
- Participants called for training programs to improve understanding of AI tools and their applications.

##### Data Privacy and Security Concerns:

- Several participants raised concerns about data privacy and security, particularly in handling donor information. This was a common theme, as many non-profits deal with sensitive personal data.
- Ensuring compliance with privacy regulations (e.g., GDPR) and maintaining donor trust were cited as priorities for AI adoption.

##### Ethical Concerns and Transparency:

- Echoing Nathan's talk, ethical concerns were a prominent issue discussed on the Miro boards. Participants expressed the need to be transparent with donors about AI use, particularly when AI is involved in personalized communications or fundraising efforts.
- There was consensus on the need for a transparent AI policy that explains to donors how their data is being used and whether AI is involved in donor interactions.

##### Bias in AI Algorithms:

- Participants voiced concerns about **bias in AI algorithms**, particularly in how AI models might disproportionately favor certain demographics or exclude others. This bias could be detrimental to the mission of non-profits, especially those focusing on **equity** and **inclusivity**.
- The group agreed that there needs to be a focus on **bias mitigation** in AI tools used by non-profits.

### Resource Constraints:

- Many participants noted that non-profits often operate with limited resources, and the cost of AI implementation can be a barrier. Organizations need affordable AI solutions and guidance on how to implement AI without overextending their budgets.
- The participants called for the toolkit to include **cost-effective strategies** for integrating AI, including partnerships or open-source tools.

### Human-AI Collaboration:

- A recurring theme was the importance of ensuring that AI complements human work rather than replaces it. Participants were cautious about fully automating processes like donor engagement and felt that the human element should remain central to fundraising efforts.
- There was also discussion about how AI can help free up human resources by handling repetitive tasks, allowing staff to focus on strategic, mission-driven work.

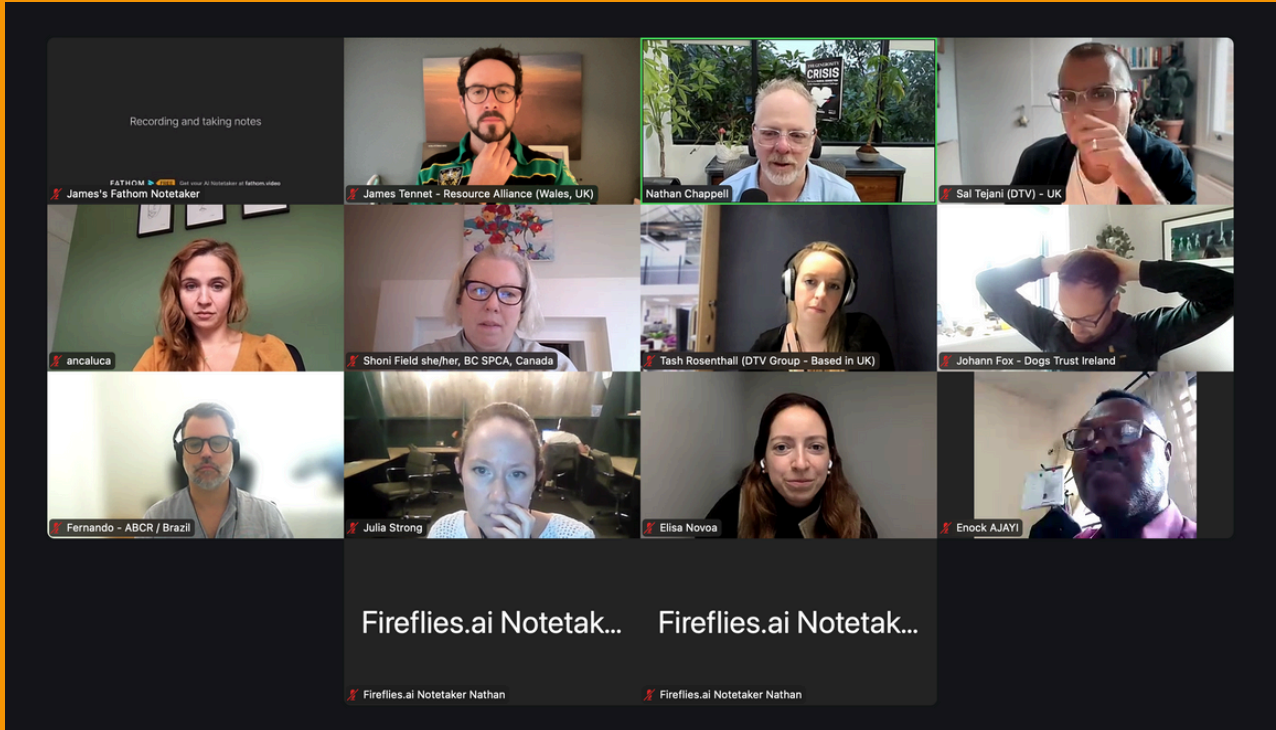
### Key Takeaways from the Miro Board Discussions:

- Education is a top priority—non-profits need to invest in training their staff to understand AI's potential and limitations.
- Data privacy and ethical transparency are critical—non-profits must communicate clearly with donors about AI use and ensure compliance with privacy regulations.
- Bias mitigation is essential—AI tools must be carefully monitored to ensure they do not introduce harmful biases.
- Resource constraints remain a significant challenge—non-profits need cost-effective solutions to adopt AI without straining their resources.

### Takeaway for the Innovation Lab:

The collaborative session revealed that non-profits share common challenges in **education, ethics, data privacy, and resource constraints** when it comes to AI implementation. The lab's comprehensive AI toolkit should address these areas by providing **training resources, cost-effective strategies**, and **best practices** for ensuring AI use is transparent, ethical, and beneficial.

# Meeting 3 Visuals



# Meeting 4 Agenda

Time	Focus
30 mins	Keynote talk from Shing Suiter, Senior Director – Technology Platforms at Mozilla Foundation on Mozilla’s journey with implementing AI: Process, learnings, and challenges
20 mins	Open Q&A with Shing Suiter
30 mins	Reviewing draft and finalising our Ethical Implementation Framework
15 mins	Review progress against Action Framework. Final thoughts, thank yous, and next steps

# Meeting 4 Outcomes

**Keynote Talk: Mozilla Foundation's AI Implementation Journey**  
**Shing Suiter, Senior Director – Technology Platforms, Mozilla Foundation**

## Introduction and Organizational Context

Shing shared insights into Mozilla's AI implementation journey, leveraging its unique dual identity as a technology company and a nonprofit advocating for privacy, transparency, and open internet. Mozilla Foundation, the philanthropic arm of Mozilla Corporation, operates globally, emphasizing movements like climate justice and trustworthy AI. The foundation's guiding principles include prioritizing privacy, security, user agency, and putting people over profit while promoting transparency and community-based processes.

## Key Learnings from Mozilla's AI Adoption

- 1. AI Is a Tool, Not a Silver Bullet:** Shing emphasized that AI is not a magical solution. Successful implementation requires treating AI adoption like any other technology integration, with careful consideration of change management, user mapping, and business processes.
- 2. Global Privacy Standards and Vendor Accountability**
  - Mozilla applies the most restrictive global data protection standards across all jurisdictions, such as GDPR-compliant consent banners.
  - They negotiate with vendors to ensure user data isn't used for training AI models, reflecting a strong commitment to data privacy and ethical practices.
  - A notable example involved rejecting a fundraising vendor's proposal to use donor data for AI training.
- 3. Transparency and User Trust**
  - Transparency in AI implementation was highlighted as critical. Mozilla informs users how their data is used and allows them to opt out of certain features.
  - Shing discussed challenges with vendors reluctant to disclose AI workings due to intellectual property concerns but stressed that proactive negotiation can yield better outcomes.
- 4. Staff Engagement and AI Adoption Challenges**
  - Mozilla staff, primarily activists and fundraisers, displayed fatigue from adopting new technologies. Resistance stemmed from competing priorities and a lack of perceived immediate relevance of AI to their roles.
  - Regular surveys helped identify and address concerns, such as data security and privacy issues, which are central to their mission.

### 5. Strategic Pilots for AI Integration

- Mozilla initiated narrow pilot projects, such as sentiment analysis for donor interactions, to demonstrate AI's potential benefits. This approach sparked creativity and buy-in from teams by showcasing tangible impacts.

### Key Themes from the Q&A

#### 1. Cultural Resistance to AI Adoption

- Despite being part of a tech-focused organization, many Mozilla staff prioritized their activist and fundraising goals over learning new AI tools. Overcoming this required demonstrating how AI could directly enhance their work.

#### 2. Balancing Transparency with Vendor Constraints

- Vendors often resisted disclosing details about their AI systems due to intellectual property concerns. Shing advised persistence and thorough negotiations to align vendor practices with organizational values.

#### 3. Ethical AI as a Competitive Differentiator

- Mozilla's firm stance on privacy and ethical data usage not only protects user trust but also sets a high standard in their sector, making them a leader in responsible AI implementation.

### Actionable Takeaways for Ethical AI Implementation

#### Integrate Privacy and Ethics from the Start

Apply the most restrictive global privacy standards universally and include robust data protections in contracts with AI vendors.

#### Engage Stakeholders with Transparency

Build trust by openly communicating AI's role, risks, and data usage policies to staff and external stakeholders.

#### Start Small with Strategic Pilots

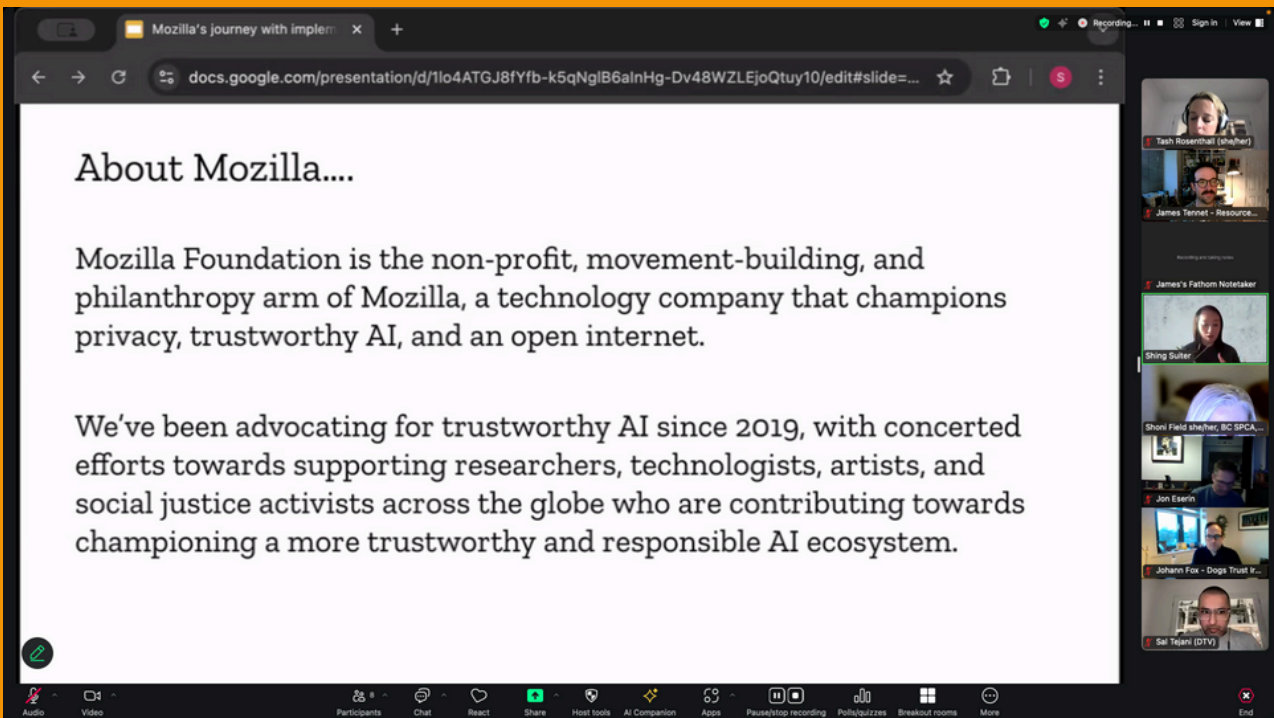
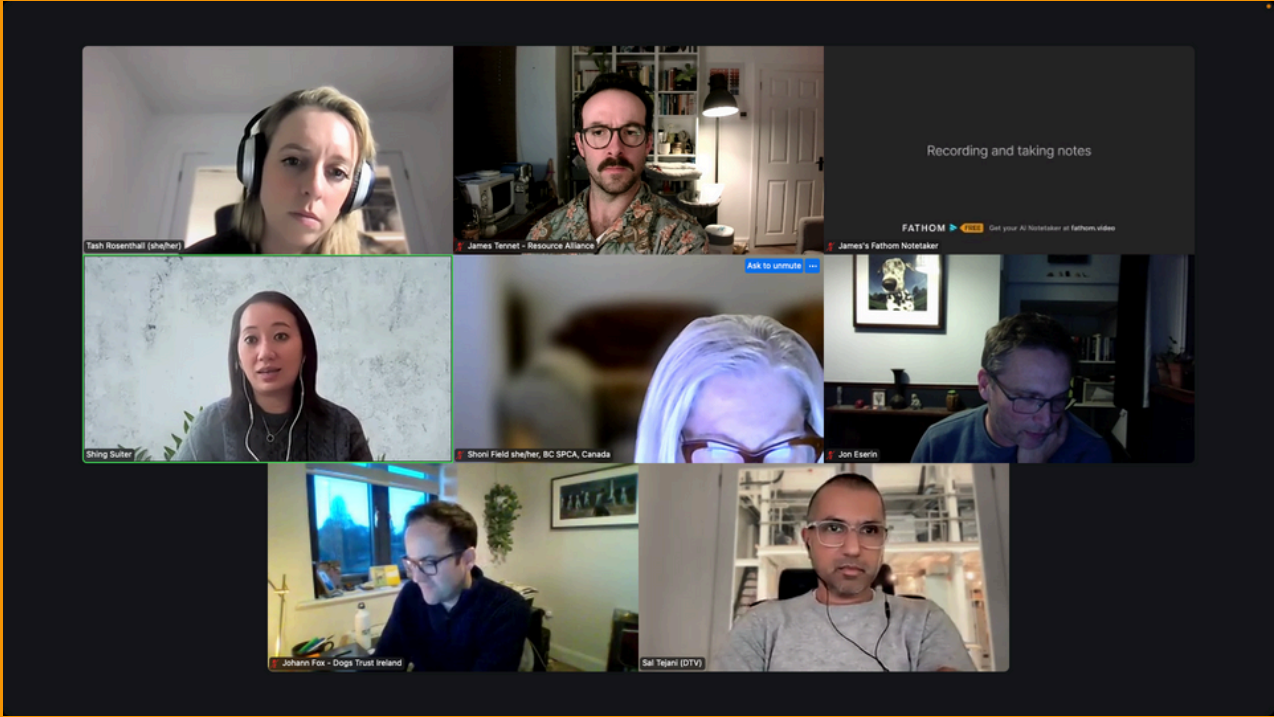
Identify narrow, impactful AI use cases to gradually introduce AI capabilities and gain organizational buy-in.

#### Ensure Values Alignment with Vendors

Push vendors to adhere to high ethical standards, even when it requires challenging conversations about intellectual property or operational constraints.



# Meeting 4 Visuals



# Ethical AI Implementation Framework for Non-Profits

AI adoption can be overwhelming. This framework is a high-level and adaptable yet comprehensive template to help non-profit organizations implement AI ethically and responsibly. While incorporating the framework into your work, it is important to remember that AI has limitations and isn't a magical solution to fixing bad processes.

---

## 1. Core Ethical Principles

- **Trust and Transparency:**
    - Communicate clearly with stakeholders about how AI supports decision-making. Ensure AI-generated content or actions are transparently identified in public communications.
  - **Bias Mitigation and Monitoring:**
    - Use diverse, representative datasets and conduct regular audits of AI systems for potential bias. Perform regular bias checks by reviewing AI decisions for consistency across different demographic groups. Adjust AI models as necessary to eliminate patterns of bias.
  - **Human-AI Collaboration:**
    - Define clear workflows where AI assists with tasks but human oversight remains central to high-stakes decisions, ensuring human judgment is not completely replaced. We must always maintain a human-centred approach to our work – AI should enhance human capabilities while respecting human dignity.
- 

## 2. AI Use Cases and Responsible Applications

- **Fundraising and Donor Engagement:**
  - Set clear ethical limits for personalized AI communications. Ensure AI-generated messaging reflects the organization's tone and allows recipients to control the frequency of contact.

- **Volunteer Management:**
    - Ensure that AI-driven volunteer matching systems are transparent and regularly reviewed to avoid favouring certain demographics or excluding others unfairly.
  - **Content Creation:**
    - Disclose when AI-generated content is used. In sensitive areas, such as creating visuals, clearly inform stakeholders about AI's role in generating that content.
- 

### 3. Privacy, Data Security, and Compliance

- **Privacy and Data Protection:**
    - Implement anonymization techniques to safeguard personal information before data enters AI systems. Develop protocols for securely handling and processing data. Regularly update and audit these practices to meet current privacy regulations.
  - **Compliance with Legal Frameworks:**
    - Ensure regular training for staff on applicable data protection laws. Conduct compliance audits and integrate these checks into AI project workflows to maintain transparency and legal accountability.
- 

### 4. Cost-Effective AI Implementation Strategies

- **Partnerships and Open-Source Solutions:**
    - Establish collaborations with educational institutions or explore open-source alternatives to reduce costs.
    - Create a budget plan that balances the cost of AI tools with the organization's financial capacity.
    - Prioritise and pilot different AI solutions based on what will be most impactful for your work.
-

## 5. Education and Capacity Building

- **Staff Training:**
    - Provide regular AI-related training to staff, focusing on ethical considerations and practical applications. Create learning pathways for different roles to ensure that each team member understands how AI impacts their work.
  - **Stakeholder Engagement:**
    - Run workshops or informational sessions for your community to explain how AI supports the organization's mission. Invite feedback to ensure AI use aligns with stakeholder values and expectations.
- 

## 6. Long-Term Monitoring and Adaptation

- **Continuous Learning:**
  - Implement an ongoing feedback mechanism to assess the AI system's effectiveness and ethical standing. Adjust policies based on this feedback to ensure AI tools evolve responsibly over time.
- **Feedback Loops:**
  - Create structured opportunities, such as surveys or focus groups, for stakeholders to share their experiences with AI systems. Use this input to refine AI practices and address emerging ethical concerns.
- **Accountability:**
  - Establish an AI ethics committee or appoint a designated ethics officer. Set up regular review meetings to assess AI's alignment with organizational values and ethical standards.

# Conclusion & Next Steps

The Innovation Action Lab has demonstrated the value of collaborative, focused efforts to tackle the emerging challenges and opportunities presented by AI in the non-profit sector.

Through a year of insightful discussions, expert keynotes, and practical case studies, the Lab achieved its goal of equipping non-profits with the knowledge and tools to ethically and effectively implement AI.

The Lab highlighted the potential of AI to transform operations, enhance fundraising, and improve stakeholder engagement while emphasizing the importance of maintaining ethical standards.

Keynote talks and case studies demonstrated both the opportunities AI presents and the risks associated with bias, data privacy, and misuse.

The **Ethical AI Implementation Framework for Non-Profits** co-created by the group provides practical guidance for ensuring transparency, addressing bias, and fostering human-AI collaboration. The Framework underscores the importance of protecting data privacy and maintaining human dignity as organizations integrate AI into their operations.

The Framework, alongside resources shared in Lab meetings, offers tangible steps for non-profits to approach AI adoption responsibly, from developing internal policies to engaging stakeholders. The Framework will be shared across the Resource Alliance Global Community network to empower non-profits with actionable insights and guidelines. This includes making it accessible to a wide audience through events, newsletters, and online resources.

By prioritizing ethics, transparency, and collaboration, the work of the Innovation Action Lab has set a strong precedent for how non-profits can navigate the complexities of AI responsibly.

# Acknowledgements

An extra special thank you to the Lab Leaders of this Innovation Action Lab for their tireless efforts setting agendas and driving the work throughout the year:

**Anca Luca**, Social impact entrepreneur at The Roots (Netherlands)

**Elisa Novoa**, Capacity Strengthening Lead at Forus (Portugal)

**Tash Rosenthal**, Executive Producer at DTV Group (UK)

Thank you to all the Action Lab participants for your hard work and dedication:

**Asu Sanem Kaya**, Fundraising and Communications Director at Anne Çocuk Eğitim Vakfı (Turkey)

**Enock Ajayi**, Deputy Chief Advancement Officer at Federal University of Technology Akure (Nigeria)

**Fernando Nogueira**, Executive Director at Associação Brasileira de Captadores de Recursos (Brazil)

**Johann Fox**, Head of Development at Dogs Trust Ireland

**Jon Eserin**, Assistant Director – Public Fundraising & Mass Engagement at RSPCA (UK)

**Julia Strong**, Head of Philanthropy & Partnerships at Hamlin Fistula UK / Julia Strong Fundraising Consulting (UK)

**Paula Attfield**, CEO at Stephen Thomas Ltd. (Canada)

**Saleem Tejani**, Head of Digital at DTV Group (UK)

**Salvatore Salpietro**, Chief Community Officer at Fundraise Up (USA)

**Shing Suiter**, Senior Director, Technology Platforms, Mozilla Foundation (USA)

**Shoni Field**, Chief Development Officer at BC SPCA (Canada)

Report compiled by:

**James Tennet**, Global Community Event Manager at the Resource Alliance (UK)