



Charity AI Partners

Robot Surfers, 007 and the Wisdom of Abraham Lincoln

How AI can help your charity do more and do it better, without breaking trust with your staff or supporters

Darren Richards · The Charity AI Guy · Charity Learning Consortium Virtual Members' Meeting





My "why"

A world where every charity is human-led,
every mission is fulfilled with integrity,
every supporter is treated with dignity.



Charity AI Partners



Who am I?

Darren Richards

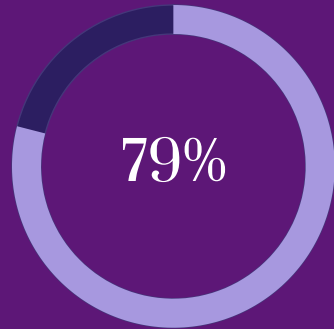
"The Charity AI Guy"

- Expert on AI for charity fundraising
- Creator of the *Humans Lead, AI Scales* framework
- Over 24 years in charity fundraising and leadership
- Advising charity CEOs on 5 continents
- Author & Podcast Host
- Writes for Third Sector
- Founder of "Charity AI Partners"

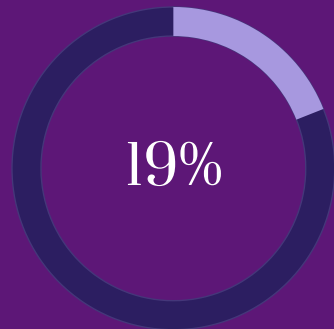
Instagram: @CharityAIGuy



Bridging the "AI Governance Gap"



of charities use AI every day



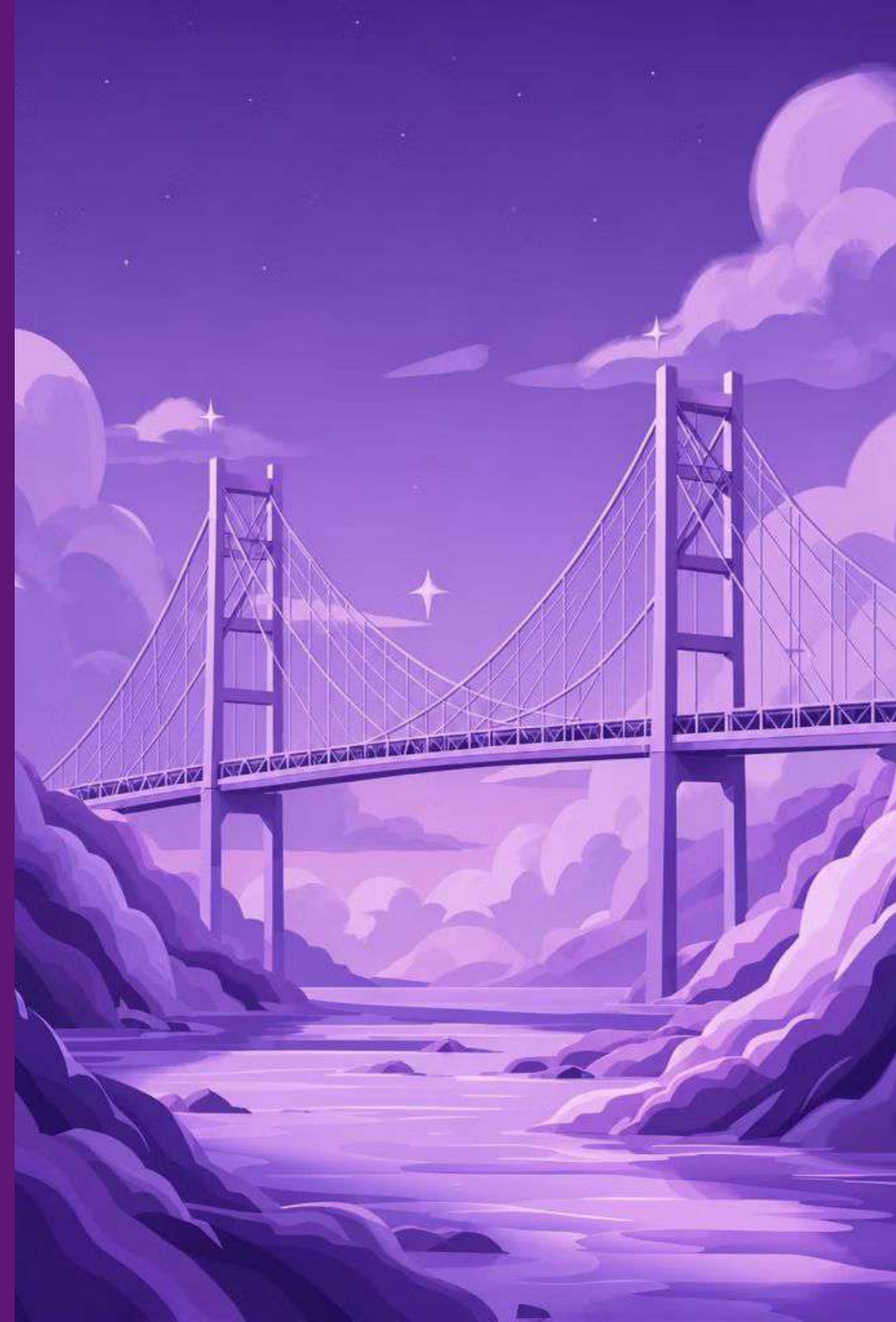
1 in 5

have an AI strategy to make it work for them

SOURCE: Charity Digital Skills Report 2026

AI is being used in your charity without safeguards... the "side of fries" syndrome

This is not a technology gap. It is a leadership and decision chasm.



How AI grows up



Child

The chatbots: ChatGPT, Claude, Gemini

Question in ("prompt") » Answer out

- ✓ **Pre-training**
- ✓ 'Out of the box' **Skills** (e.g. SoP sequence)
- ✓ **Memory** about you (in the settings)



Student

ChatGPT Work, Claude Cowork

- ✓ Pre-training
- ✓ **Skill sets**
- ✓ **Context** (e.g. project, more than memory)
- ✓ **Tools** (e.g. connectors or GPT apps)
- ✓ Timetable / **Schedule** (e.g. every Monday)
- Waits for permission or a push



Professional Employee

Claude Code, ChatGPT Codex

"Agents" are AI with a job description

Need to be onboarded like any newly qualified and recently appointed employee.

- ✓ Pre-training
- ✓ Sets of skills AND Context AND Tools
- ✓ Schedule or '**Always running**'
- ✓ **Works independently to achieve a goal.**
- You decide where YOU want to be consulted.



The chatbots

ChatGPT · Claude · Gemini · Grok · Meta AI

Aggregators: Perplexity, Copilot

Question ("prompt") → Answer

What are AI models?

Company	LLM: the brain	Harness: how you 'speak to' the LLM	Latest Model release
Anthropic	Claude	Claude, Cowork, Claude Code	Fable 5.1
OpenAI	GPT	ChatGPT, ChatGPT Work, Codex	GPT-6 Astra
Google	Gemini	Gemini app (also Gemini "AI mode" in Google search, Gmail and Docs)	Gemini 3.8 Flash
xAI	Grok	Grok app, Grok in X, Tesla voice agent	Grok 4.6
Microsoft	<i>Aggregator</i>	Copilot (also in Word, Excel and Teams)	Can use: Claude (Opus, Sonnet) GPT 5.5 & 5.6
Meta	Llama <i>"open weights" **</i>	Meta AI is in WhatsApp and Instagram. It can also run your own server/laptop, which keeps the model on your laptop not in the cloud	Llama 4

**Paying for Microsoft covers Claude too. The only difference is where it's processed, outside the UK and EU data boundary. That's a DPIA deciions. Your IT admin can turn Claude on for Copilot.*

***Meta publishes Llama's "weights", which means anyone can download the "brain" and run it locally on their own hardware.*

What about these Secret Agents?

Agents are AI with licence to... act on your behalf.

AI with "*a role, a goal and tools*"

- **"Goal »to» Result"** NOT question »to» answer
- Agents make a plan, then take action towards a destination you set
- Some agents brief and oversee other agents

Shhh. The Top Secret?

An agent is just a set of folders, that an LLM reads:
context, skills, tools.



AI terms

.MD / Markdown File: a plain text file with a bit of simple formatting. Humans can read it, AIs can read it, and Claude Code or ChatGPT Work scan it before they start. You do not want the memory of your business trapped in PDFs and Word docs.

Shadow AI: staff using it quietly, no agreed guardrails or safeguards

- **Tools:** how AI takes actions in the real world. Tools give AI access to email, calendars, files, apps etc. (via MCP or API)
- **Memory:** AI learns its user. **So when it suggests a charity, they're more likely to give.**
- **Guardrails:** what AI must never see, say or do.
- **Routines / Scheduled tasks:** processes and skills that run routinely, after a time-based or event-based 'trigger'.
- **Compute:** the raw computer horsepower needed to create and run artificial intelligence
- **AI Inference:** the moment an AI uses what it has learned to answer a question or solve a problem
- **Tokens:** AI's currency. *One token is about 4 characters long in English text (roughly 0.75 words)*
- **Burn:** how fast you spend tokens, which are tied to "**usage**" limits and cost you pay in the real world.

PAST · Looking backwards

2, 4, 6, 8...

The next number will be  or

Looking backwards, the pattern is already there in the data.

One right answer.

AI can Predict.

Predictive AI learns from the past and forecasts **the next number**.

PREDICT · iterate · automate





One children's hospital charity. One Christmas appeal.

- 2:1 → 6:1 return
- Half the mailing
- Average gift up 28%

FUTURE · Looking forwards

Roses 1001, Violets 1004...

Roses → 1001	Violets → 1004
are → 1002	are → 1002
red → 1003	blue → 1005...
AI reads "...1001, 1002, 1003..."	"...1004, 1002, 1005..."

Looking forwards, what could come next?

No one right answer.

AI can Iterate.

Generative AI looks ahead and writes the next word.

predict · **ITERATE** · automate



How Generative AI works

AI gives every word a number, then guesses the most likely next word.

Hence "Large Language Model"

GPT? =

- **Generative:** generates text and images
- **Pre-trained:** learns from billions of words
- **Transformer:** AI turns words into giant number tables known as "vectors"

A "vector" is a list of numbers that represents data like words, images, or audio so a computer can understand it.

When you ask the AI a question, it turns your question into numbers too.



PRESENT · Taking action

1 then → 2 then → 3

"Agentic" AI has "agency".

Role to Goal

You give the goal. It plans the HOW, takes ACTIONS.

Keeps trying and learning until it succeeds.

AI can Automate.

It takes the next step, now.

predict · iterate · **AUTOMATE**



Three words to remember



Predict

the next number (the past)

Predictive AI



Iterate

the next word (the future)

Generative AI



Automate

the next step (the present)

Agentic AI / Automated Workflows

Everything AI does for your fundraising fits into one of these three buckets.

Predict, in practice

Smart donation pages:

The page notices who's visiting. Phone or laptop, what people in that postcode usually give, even a low battery. The suggested amounts change for each person, and there's no form to fill in.

Donor propensity:

Who's most likely to give, move up to regular giving, or drift away, so your team spends its time where it counts.

Segmentation:

Which supporters get which appeal, sorted by how and when they give, at a level of detail no team could manage by hand.

Gifts in wills:

Spots the giving patterns of people likely to leave you a gift in their will, who'd otherwise be missed.



Iterate, in practice

Hyper-personalised appeals:

A different version for each supporter, in the post and online, at a scale you could never manage by hand.

Design:

Create images, social posts and designed presentations.

Grants:

Search the funding databases for good matches, then draft each application in that funder's own words and priorities.

Ideal Supporter Profiles:

Built from your giving records, emails and comments, then used to find look-alike donors.



Automate, in practice

Agentic:

Digital employees. Website chatbots, prospect research, tone-of-voice brand bots, report writing, diagnostics.

Stewardship journeys:

From welcome to renewal, and lapsed donor reactivation segmented by time since the last gift.

WhatsApp journeys:

The app people keep for friends and family. Polls and questions tailor the responses, a video from your CEO lands in the thread, and every answer updates your CRM.

Information:

Summarising reports, Note taking, EA tasks, policy compliance chatbots, FAQs.

Research:

Job candidate research/headhunting, company prospecting, and major donor pipelines.





The robot surfers?

More than half of all web traffic is now AI.

Your website was built for humans.



AEO: Why the old shop window is shattered

Nearly 7 out of 10 Google searches now end without a click.

The answer people act on is written by an AI chatbot. It names a charity, or it does not.

In other words

Your **CEO** needs to know **GEO** and **AEO**, not just **SEO**.

Do do that well, decide your **USP** and your **ICPs**.

Oh me. Oh my.

SEO, Search Engine Optimisation: Being found by Google.

GEO, Generative Engine Optimisation: raising your charity brand's visibility across the AI platforms.

AEO, Answer (or "Ask") Engine Optimisation: optimising your online content so AI chatbots cite and link your charity in their answers.



How can you influence what AI chatbots say about your charity?



1. Citations by credible third parties

Membership websites, press releases, journals, articles, blogs, podcasts.



2. Opinions on social media

Not your own socials. LinkedIn, YouTube, Reddit:
Other people's view of you, which AI treats as independent.



3. Back-end web code and schema markup

Schema tells AI what to take back to the AI chatbot enquirer.

If AI crawlers are blocked by your site, nothing else matters.



4. Question and Answer copy on your website

Clear FAQs give AI-ready answers to the questions donors actually ask, so it can quote you.



5. Describe yourself in the same way everywhere

And use one consistent name for your charity.

Especially social bios and LinkedIn headers, so AI attributes everything to you.



But, but, but...



People

Jobs, and team dynamics.



Environment

Energy and water.



Risk

Data, privacy, bias,
reputation.



Cost

Budgets are already
squeezed.

...Trustees, C-Suite, Staff, Supporters, Volunteers, Partners, Funders

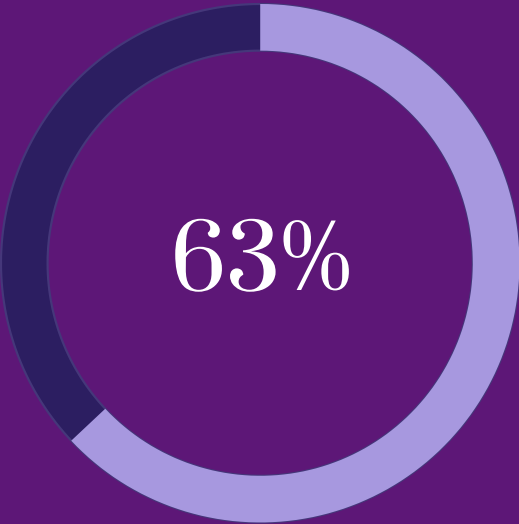
Remember Blockbuster Video?

Blockbuster laughed at the man who wanted to abolish late fees...

so he founded *Netflix*.

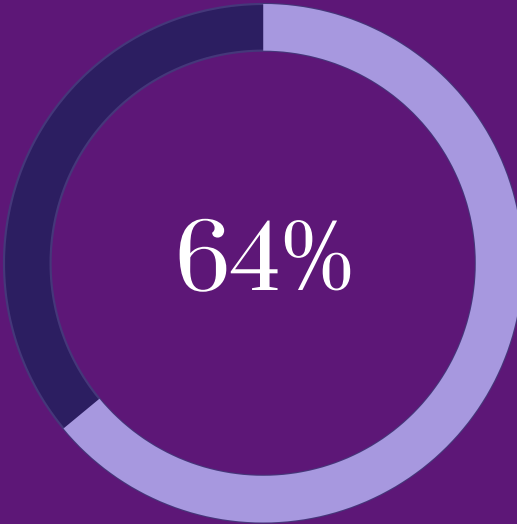


Larger charities are now pulling away from small charities using AI



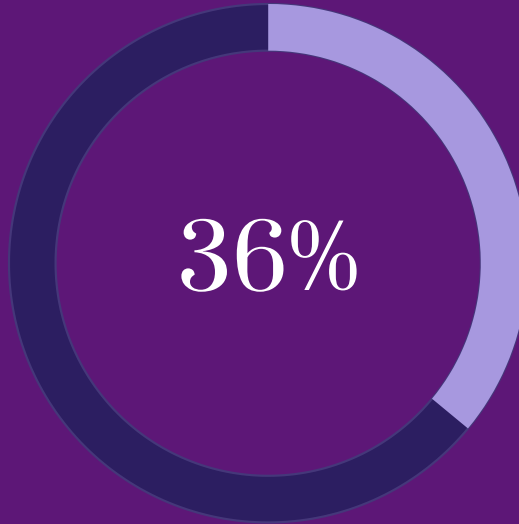
63%

of charities say **squeezed finances** are their biggest barrier.



64%

of charities over £1m are now **prioritising an AI strategy**.



36%

are **using AI** for communications and fundraising.

SOURCE: Charity Digital Skills Report 2026



The Feeling Economy

AI is perfect fit for our sector....

Moravec's Paradox:

what computers find hard, humans find easy, and vice versa.

AI is brilliant at logic and patterns. It struggles with emotion and empathy.

⚠️ AI can read billions of words, but it can't read the room.

✅ The **human premium**: as AI takes over routine work, this means empathy, connection, taste and fresh ideas become more valuable.

Humans are freed for heart work.



Humans Lead, AI Scales

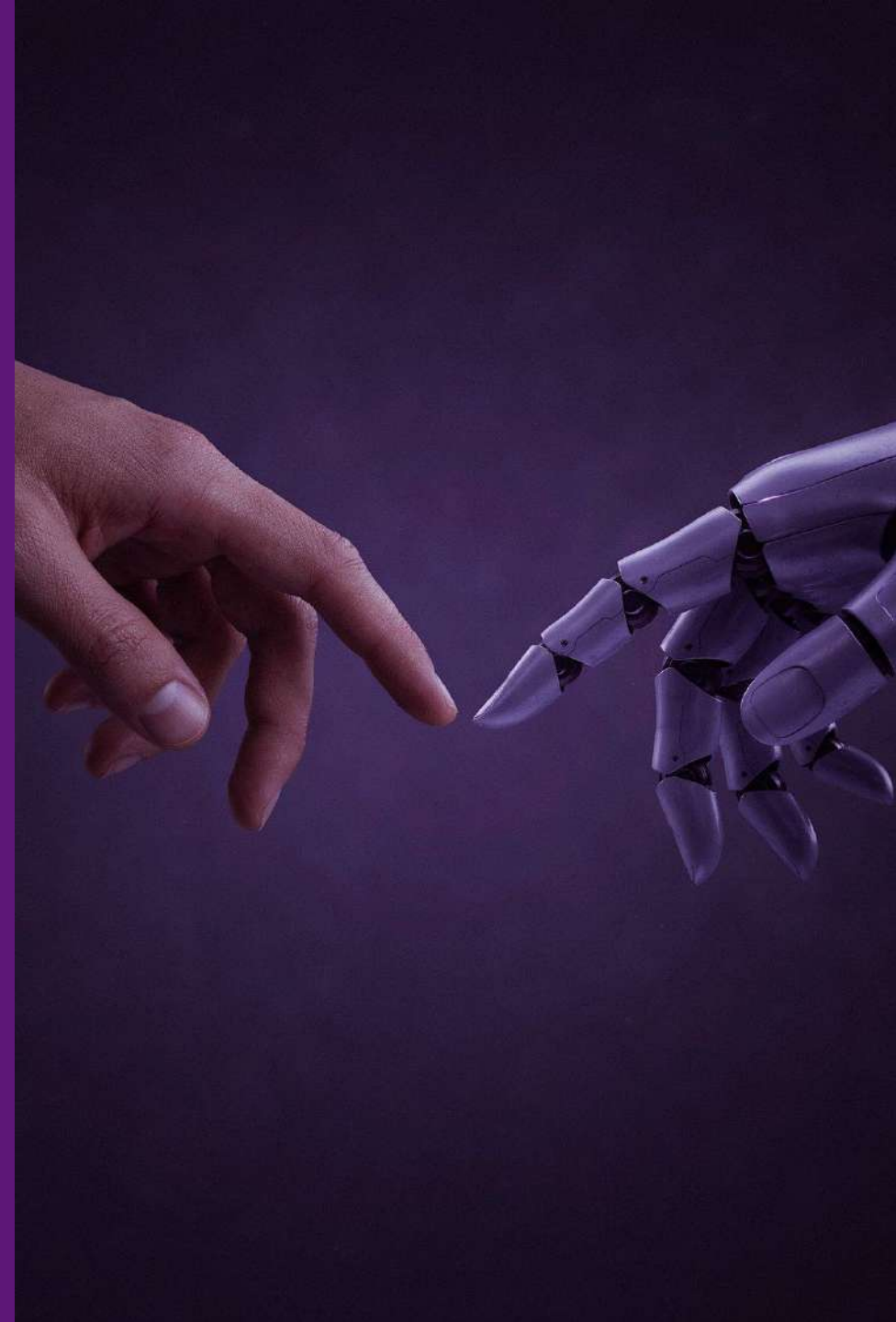
Humans Lead

Collect · Connect · Lead

AI Scales

Predict · Iterate · Automate

AI scales what humans decide. Not the other way round.



I asked 100 charity leaders

"Which human responsibility matters most in an AI future?"

Two-thirds gave the same answer:

Connection.

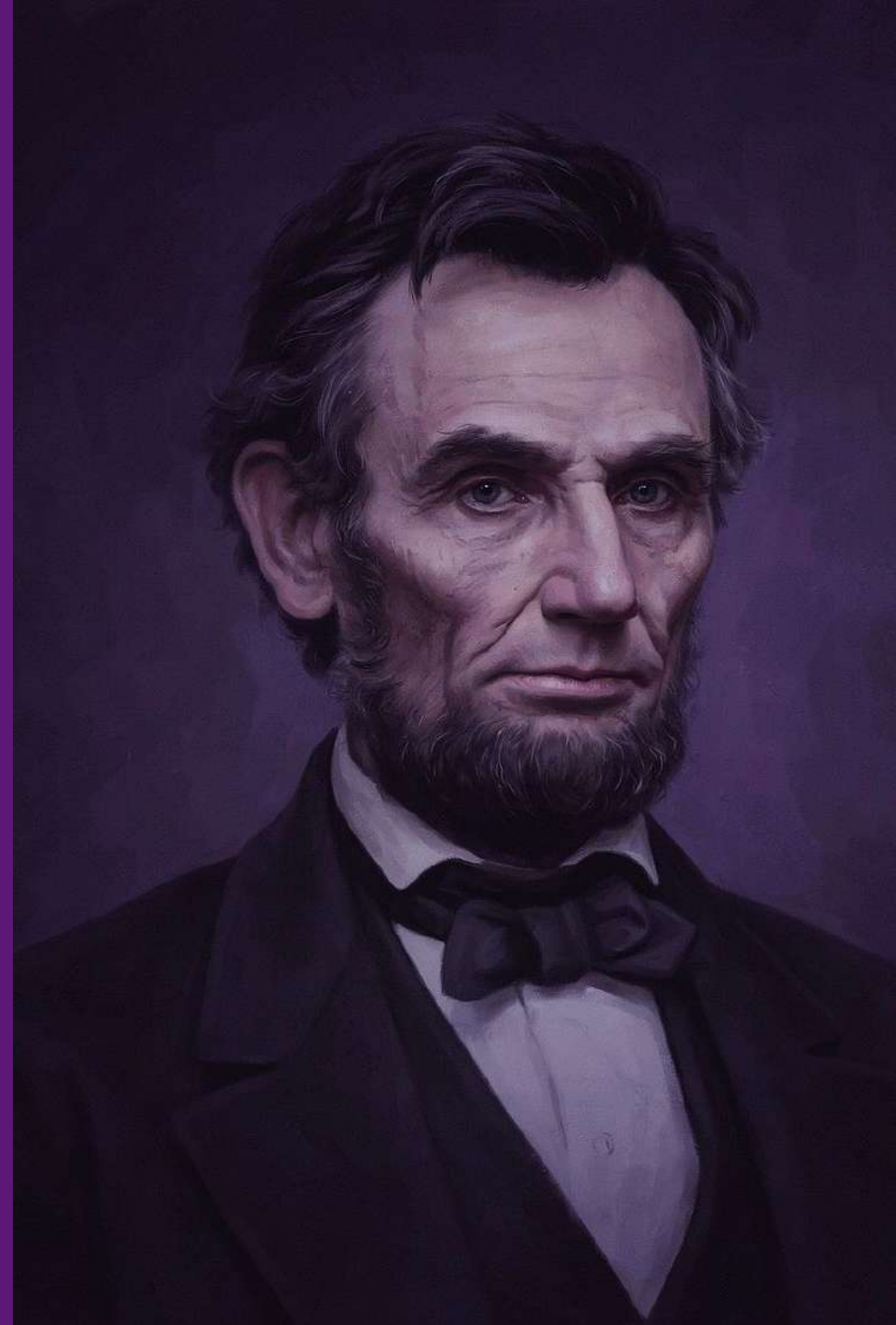


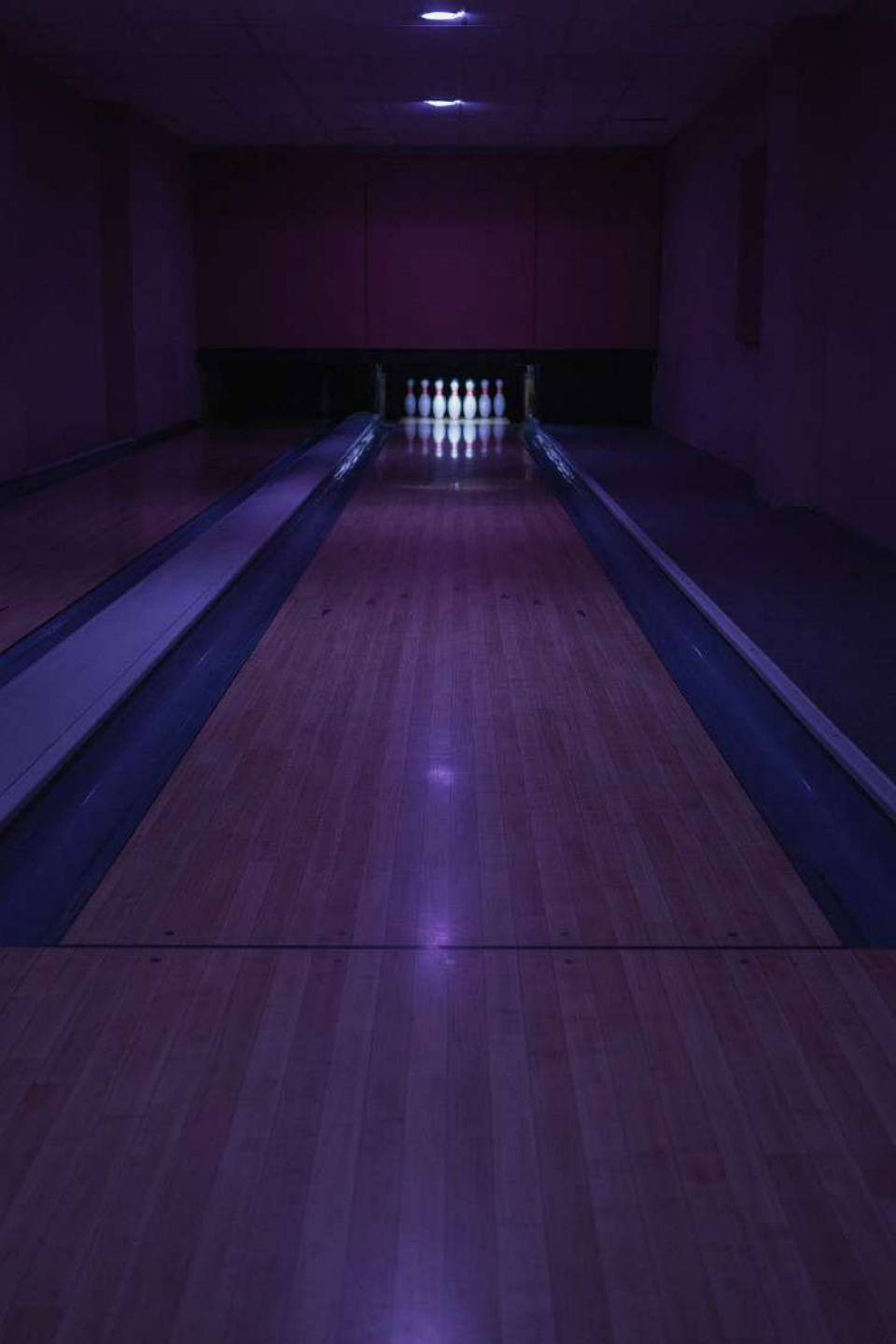
Abraham Lincoln

"Give me six hours to chop down a tree and I will spend the first four sharpening the axe."

✔ Governance and leadership decisions are how we sharpen the AI axe.

To safeguard our relationships with staff, supporters and stakeholders.





AI without breaking trust



AI has no conscience. It only sees numbers.

And it works to achieve optimal solutions.

Words are turned into numbers, so it's not clear what it should not do.

Set AI a goal and it will find the most efficient way to achieve that 'end', unless you tell it which 'means' are off limits.

Guardrails" are like the bumpers on a bowling alley

- Put the bumpers up before you bowl the first ball, not after.
- Free chatbots learn from what you type. Paid *Enterprise* accounts do not.
- No supporter, service-user or staff data in any tool, unless DPIA approved.
- **AI outputs never reach a supporter without a person deciding first.**

You decide the Ethical Red Lines

What kind of guardrails and 'red lines' can you decide?



Bereavement & Grief

Strictly Forbidden

No AI involvement in contacting donors during times of grief or vulnerability.



Acquisition & Data

Strictly Forbidden

No purchasing of email lists from commercial brokers for AI targeting.



Fabrication & Truth

Strictly Forbidden

No inventing fake beneficiary stories, images, or testimonials.

Rule of Thumb: If it requires emotional empathy, human judgment or human relationship, it should remain human-only.

From a 1979 training manual

"A computer can never be held accountable.

Therefore a computer must never make a management decision."

IBM, 1979



Accountability always rests with
human leaders.

"It was AI's fault" won't hold water.



Think of AI as

A world-class...

editor · researcher · recruiter · tutor · data analyst · PA



BUT.... you still make the final call.

You set the guardrails.

You sign-off the outputs.

Allying job fears

Does your charity have a *computer*?

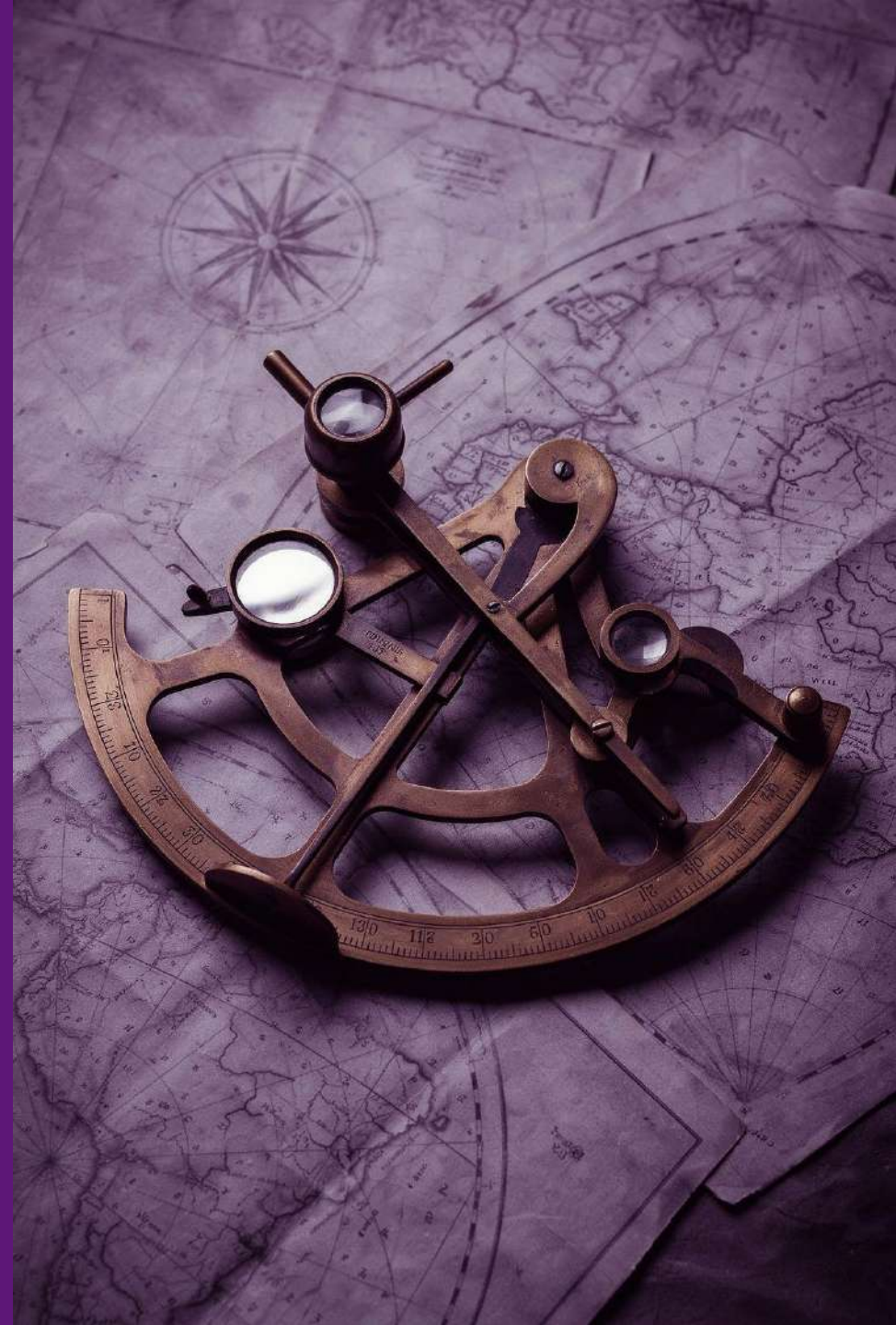
From 1613 to the 1950s, a "computer" was a person.

It was human job title.

Brilliant mathematicians did the calculations by hand for over 300 years.

We're living through a **third industrial revolution**.

Many jobs we think of as exclusively human are being transformed again.



These human qualities and roles will be "EVERLASTING"

Experience · lived, real-world knowledge

Vision · purpose, destination, the why

Ethics · what should happen, not what could

Relationships · trust is built by people, not chatbots

Love · you can't synthesize sincerity

Authenticity · the opposite of artificial

Strategy · a computer can never be held accountable

Taste · the antidote to AI slop

Invitation · humans inviting humans to help humans

Novelty · out of the box, not a black box

Gratitude · thank you, and really mean it





Do you want it fast, cheap, or high quality?

"You can only pick 2"

AI will always...

Amplify

quality versus the no-go areas

Accelerate

speed versus safety

Multiply

productivity / cost savings versus human connection

The Fable of the Proud Captain

In a dense fog, a ship's captain spots a light directly ahead...





The lighthouse

A lighthouse helps you navigate. It doesn't steer the ship.

You steer. AI lights and speeds the way.

How I help charities

The priorities to get right

1. AI strategy: why, when, where, who owns what
2. Adoption: the how, and which tools
3. Hearts and minds: culture eats strategy for breakfast

Advise:

Peer-level, board-ready, independent.

Facilitate an AI Strategy Day:

One day with your leadership team, to create your AI strategy.

Pilot a 90-day fundraising Sprint:

Prove the return with one campaign.

Connect you with vetted AI providers:

The right fit for you, amid the noise.



Humans Lead



Collect

Ethical data

Gathering insight, listening to supporters, understanding context that only humans can interpret.



Connect

With supporters

Building relationships, creating emotional resonance, fostering trust with donors and communities.



Lead

On values and boundaries

Setting direction, making values-based decisions, owning governance of the organisation's AI journey.

AI Scales



Predict

Patterns in data

Using data to forecast donor behaviour, identify opportunities and allocate resources effectively.



Iterate

Content across channels

Personalising content at the individual level, tailored to each Ideal Supporter Profile, through AI-generated variations and testing.



Automate

Journeys and systems

Scaling personalised supporter journeys, automating routine communications, freeing human time.

Thank you

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Charity AI Partners



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