

The Fundraiser's Guide to AI

Save Time, Cut Costs,
and **Maximise Your Impact**



Table of Contents

Introduction	3
What actually <i>is</i> AI?	4
Which jobs is AI good at?	6
How AI can transform your fundraising	7
3 ways we've powered-up Beacon with AI	12
Things to be aware of	14
AI case study: Parkinson's UK	15
Wrap up	16

Introduction

Some say that in the autumn of 2022, the world changed. On November 30th of that year, OpenAI, architects of ChatGPT, launched version 3 of its groundbreaking chatbot software. Even though the technology had been in development for several years, this was the first time the general public could get a glimpse into what the company had been building, and it blew many people's minds.

Suddenly, everything that science fiction has told us about what was possible with AI, seemed to be coming true. You could speak directly to this machine on any subject, and it would respond in an eerily human-like manner. It could produce stunningly original-sounding content, summarise huge datasets and translate text to any language in seconds.

Some tech entrepreneurs hailed this a new dawn, likening it to the arrival of the printing press and the industrial revolution, where others were more cautious, calling for a pause on all developments in the field.

Much has been written about AI in the past couple of years. But now the dust is settling, and the technology is beginning to mature in the marketplace. In this guide, we're going to take you on a whistlestop tour of AI, and help you figure out exactly how you could use it to support your fundraising, your charity's processes and ultimately, your impact.



What actually is AI?

AI (artificial intelligence) is essentially a machine that mimics human behaviour in terms of logic, reasoning and even creativity. The better the AI, the more indistinguishable it is from a real human. Although AI might seem like a 21st century phenomenon, its roots can be traced back to the 1950s when scientists, mathematicians and philosophers began to discuss and experiment with the ideas that science fiction had laid down only a few decades previously.

Perhaps the most notable name in the realm of early AI is Alan Turing, who devised the Turing Test, a simple method to test a machine's ability to behave indistinguishably from that of a human, under certain conditions. Since then, AI has been on a rollercoaster of success and setbacks, but for the purpose of our guide, we are going to focus on two important interpretations: traditional AI and generative AI.

Traditional AI

When most people think about AI, they're imagining what we might call traditional AI. This form of AI relies on pre-programmed rules to perform specific tasks, and is used to create tools such as chatbots, voice assistants and cross-sell recommendation engines (i.e. the "you might also like" feature on e-commerce stores). The key distinction is that under the hood, this software works against a set of "if this, then that" instructions. It listens to user input, then it selects a course of action based on what was requested. By any standard, traditional AI and the software that uses it is still an incredibly useful tool, and will probably make up the bulk of what you do with AI technologies in your charity in the foreseeable future. But we also have Generative AI...

Generative AI

The reason why the release of GPT3 in 2022 was such a watershed moment, is because it introduced the world at large to the idea of generative AI (often called GenAI). What this technology does is enable you to create something essentially out of thin air, by providing only a few prompts. A prompt is a request, such as "create a picture of a black tie fundraising event" (see below). GenAI draws on huge datasets to produce responses in text, image, audio and video, to user prompts. The "intelligence" layer comes into play by interpreting the prompt, looking at what it already understands about it, and then creating something new.



Generated by Google Gemini 2.5 Flash

As you might imagine, this technology really has ushered in a new dawn; one that will no doubt shake whole industries to their core. Understandably, you might be a little worried about how this could affect your work, or even your role. Do not fear though, as you'll soon see how you can apply this method of AI to support your goals rather than feel threatened by it.

Before we continue, let's summarise the key distinctions between these types of AI. Traditional AI is more rules-based, functional and baked into the way that so much of the world currently operates, whereas GenAI is more novel, creative and has much wider application. As a forward-facing fundraiser, you will probably want to make use of both, but before we get onto use-cases, let's take a look at what jobs AI is best suited to.

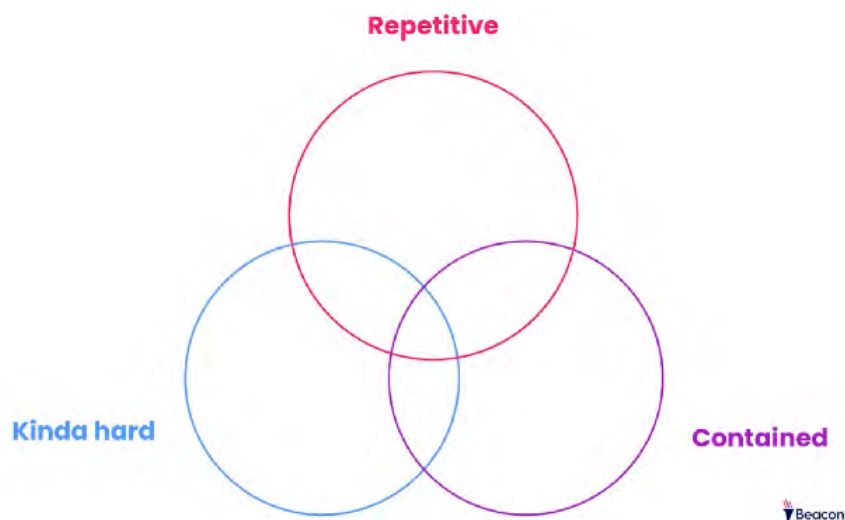
02 /

Which jobs is AI good at?

At Beacon, we've taken a slightly different approach to AI. Given the hype around the technology in recent years, it certainly feels like a bandwagon everyone has hopped onto, hoping to build the next Silicon Valley startup that gets a billion dollar buy-out. But we started by simply asking "where can this really help charities to save time or raise money?"

The sort of tasks we determined would be best suited to AI include a combination of three factors:

- 1 - Kinda hard
- 2 - Repetitive
- 3 - Contained (i.e. specific tasks, not general)



Take a moment to consider which tasks within your fundraising department sit at the intersection of these three factors. Which tasks are repetitive and difficult, yet specific? Chances are, these will be the first ones you'll trial AI with.

By contrast, a one-off task that's easy and quite general, like changing the contact details across pages on a website, would not be well suited to an AI (not yet, anyway!). Likewise, if a task is difficult but not repeatable, you probably wouldn't bother building automations for it. The key point here is to implement AI only for the tasks that sit in the middle of the venn diagram.

03 /

How AI can transform your fundraising

Now that we've looked at the two key types of AI (traditional and generative), and we've discussed which tasks are best suited to apply AI to, let's give some real-world examples.

But before we do, here are some general principles for deploying AI into your charity.

1 - Small steps over big strides.

Studying and using AI can easily take you down a rabbit hole where you begin to sense bigger and bigger ideas. That's great, but be sure to take small, incremental and intentional steps in the first instance, rather than trying to automate everything.

2 - Specific, time-bound projects.

Focus on solving a specific task, and view it as a small project with a deadline. This helps you contain the work and not allow it to impact or take over your other day to day activities.

3 - Measurable outcomes only. If a task is worth automating, it's worth knowing why you're doing it. Are you trying to save time? If so, how much? And whose time are you saving? Know the measurable factors before starting the experiment.

Your takeaway here is to not overwhelm yourself or your team by letting your AI project run away with itself. Cool? Let's dig in.

Content creation

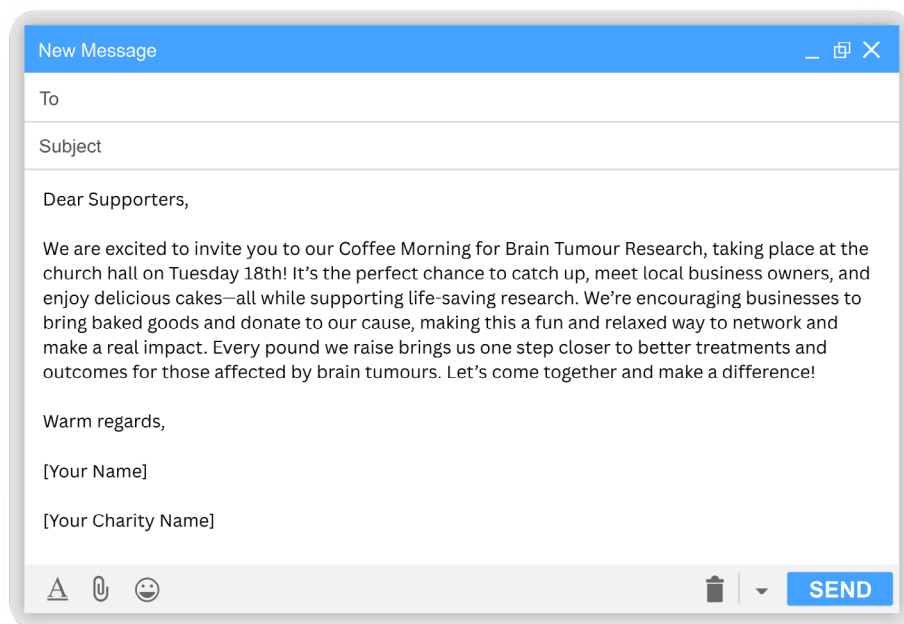
As we've already covered, AI is becoming a wonder tool at creating content, seemingly out of thin air. And in 2025, every public-facing organisation is a content-based organisation, in some way. Communication is at the heart of everything you do. Here's how AI can help:

Supporter comms

Are you hitting writer's block with the latest campaign newsletter? Ask AI to help. We prompted ChatGPT-4o with the following:

"I'm running a local coffee morning to raise funds for my charity (a brain tumour research charity). I'd like to engage local businesses to come along and make donations, as well as bring cakes to sell. The event is taking place at the church hall on Tuesday 18th. Please write a one paragraph letter to my existing supporters to tell them about it. Make it sound fun, focus on the networking aspect of it and place a big emphasis on the impact of fundraising"

Here is GPT's reply:



The image shows a screenshot of a 'New Message' email draft window. The window has a blue header bar with the text 'New Message' and icons for undo, redo, and close. Below the header, there are fields for 'To' and 'Subject'. The main body of the email contains the following text:

Dear Supporters,

We are excited to invite you to our Coffee Morning for Brain Tumour Research, taking place at the church hall on Tuesday 18th! It's the perfect chance to catch up, meet local business owners, and enjoy delicious cakes—all while supporting life-saving research. We're encouraging businesses to bring baked goods and donate to our cause, making this a fun and relaxed way to network and make a real impact. Every pound we raise brings us one step closer to better treatments and outcomes for those affected by brain tumours. Let's come together and make a difference!

Warm regards,

[Your Name]

[Your Charity Name]

At the bottom of the window, there is a toolbar with icons for text formatting (bold, italic, underline), a link icon, an emoji icon, a trash icon, and a blue 'SEND' button.

As you can see, that's not a bad output! The great thing about chat-based AI is that you can continue to converse with it. You might ask it to make the content shorter, longer, punchier or more reserved. You could also generate an image to go alongside it. With generative AI, the opportunities are endless.

We went on to ask GPT to generate a Twitter (X) post to promote the event. Within two seconds it came back with:



If you or your team struggle with comms, perhaps due to lack of capacity or skill set, AI can be your saving grace.

You might also use AI to create – or improve – any of the following:

- Volunteer or fundraiser packs
- Grant applications
- Stewardship emails
- Fundraising webpages
- Donation acknowledgements
- Newsletters



All of this comes with a **great big caveat**: resist the urge to copy/paste! Always double and triple check outputs for accuracy and relevance (more on this shortly). AI-generated content without human input can often come across generic and a little soulless, so do take the time to review the result, and make it sound on-brand for your charity.

Productivity

Machine automation has mostly been viewed as a means to speed things up, reduce the chance of human error and generally make life easier for us. But it can also inject some much-needed creativity if you're short on ideas. If you think you could use some of that, here are some examples:

Transcribe and summarise the key points of a meeting

With so much taking place online these days, it's common for the team to meet virtually. You can bring along an AI note taker like Otter.ai to sit in on the meeting and record it. Afterwards, it will spit a summary of what was discussed and capture any key points from the session. This could be extremely useful for those times when meetings overrun, or someone goes off on a tangent, and you get lost. Not only will it save you time trying to decipher the notes you scribbled down later, it will also help you zero in on what actions to take afterwards.

Generate even better emails, faster, to donors and supporters

Beacon has harnessed AI in a similar way to ChatGPT in that you can create highly engaging supporter emails quickly. In fact, we believe you can write a better email in 60 seconds, than you could on your own in 15 minutes. How? By asking the AI to generate the basis of it for you.

In the example below we've simply asked Beacon AI to write a donation acknowledgement and to make it formal. Pause for a moment and consider what this could mean for your charity. Want it short and funny? Ask the AI. Want it broken into 3 paragraphs, with a joke in the middle? Ask the AI.

Email subject

Thank you for your recent donation

Email body

Dear {{{customer.name.first}}},

Thank you for your recent donation of {{{amount}}} to The Beacon Foundation. Your generosity is greatly appreciated and will make a significant difference to the lives of those we support.

We are incredibly grateful for your support and are committed to using your donation wisely to achieve our goals.

If you have any questions about your donation, please do not hesitate to contact us.

Yours sincerely,

The Beacon Foundation Team

< >

I've created a formal donation acknowledgement email for you, using the variables you provided. Feel free to edit it further to best fit your needs.

Predicting the future

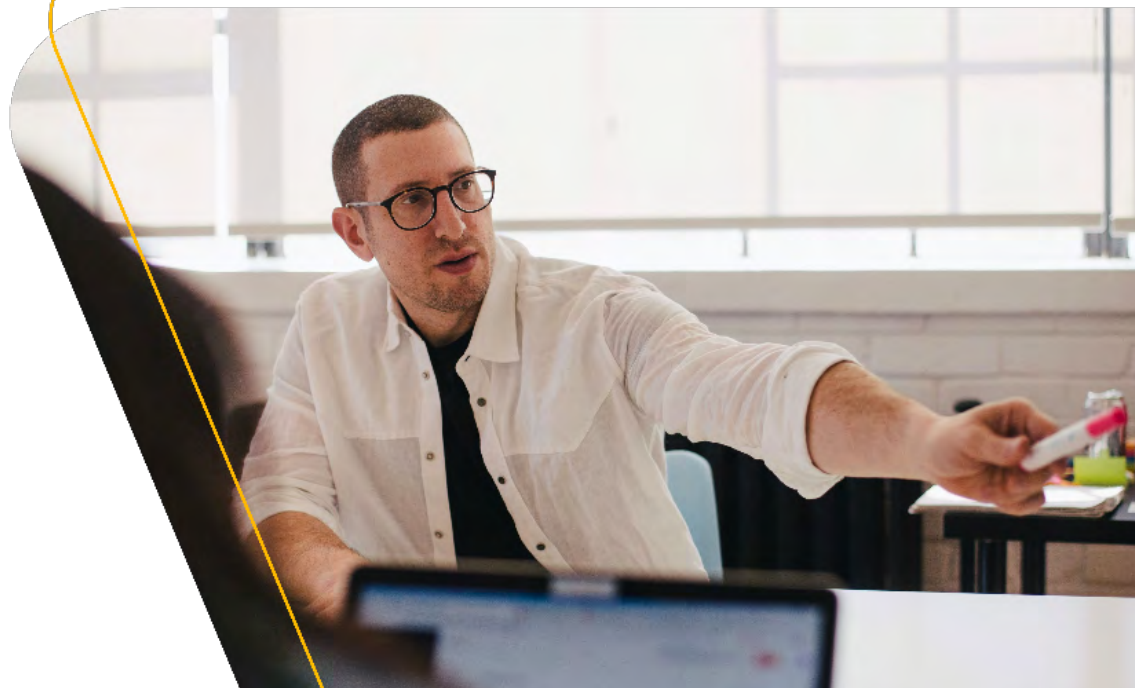
AI is a master at trawling through huge sets of data, and making sense of them. A helpful way to predict the future is to look at the past, but as humans our capacity for this is very limited. AI on the other hand, with thanks specifically to something called machine learning, can deliver all sorts of predictive insights for you.

If we take donor behaviour prediction, for example, your AI friend can look back at your donation history across donors and campaigns, looking for patterns and extrapolating the insights into a future prediction. Again, consider the implications of this – you may discover the best seasons to run specific campaigns, understand what sorts of messages re-engage lapsed donors and identify new opportunities within your current supporter base. Surely, those charities with staff eager to use AI to learn more about their donors are ultimately set to come out on top.

“ We’re exploring opportunities we just couldn’t see before because we were so busy with data handling and manual stuff that we shouldn’t have needed to do at all. We’re now thinking about projects we wouldn’t have been able to dream about with our old CRM!



Gillian Graham
@ Edinburgh Dog and Cat Home



04 /

3 ways we've powered-up Beacon with AI

As we said earlier, our mission is to help you save time, cut down costs and raise more money. AI is simply another way to achieve this. We've built AI into the fabric of Beacon CRM, and we're training it to understand the nuances of how charities operate, making this a world-class solution for charity professionals. Here are three ways that you can use Beacon AI to make your job easier (and we're adding more in the future):

01 / Segment data with a simple prompt

Need to find the perfect invite list for your next fundraising dinner? Type a prompt in plain English and Beacon AI will build the filters for you, like "show me supporters who are over 18, came to one of our events this year, and have donated over £100 in total". Filtering is nothing new, but being able to access complex data in such a human way democratises it and makes it accessible to your whole team, regardless of their technical ability. Not to mention it's a whole lot quicker!

Filter with **Beacon AI**

Show me everyone with no gift aid declaration

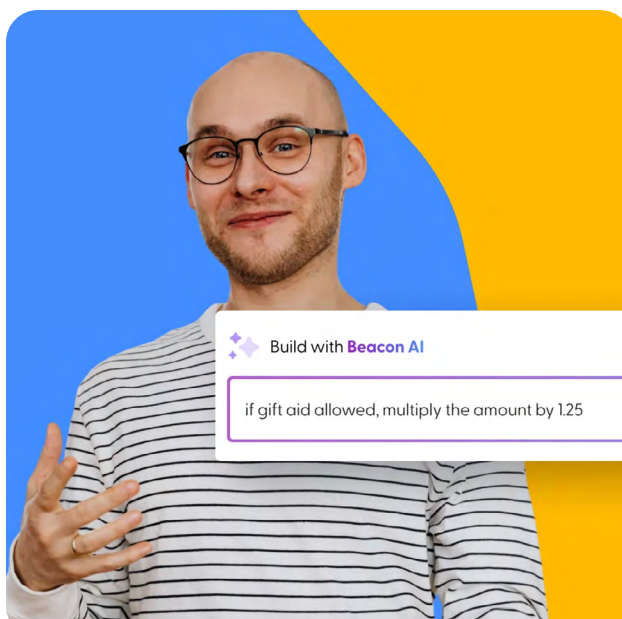
Type

Created

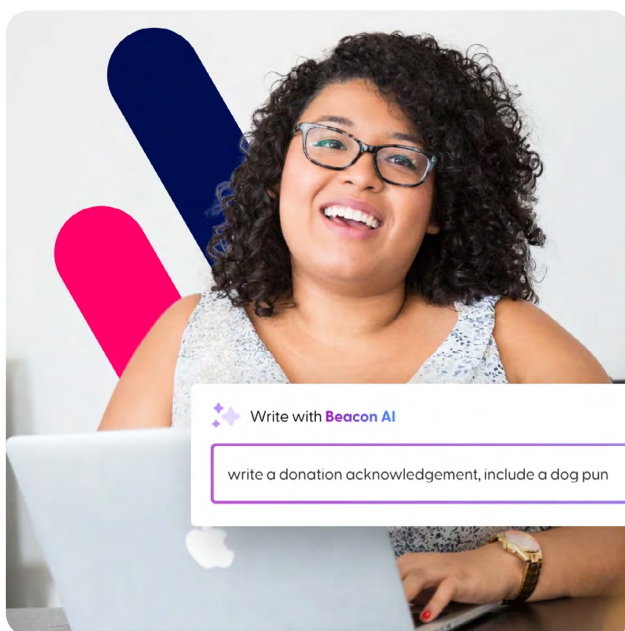
☐	AL	Mrs Ada Lovelace	ada@beaconcrm.org	Volunteer, Member	16 minutes ago
☐	AT	Mr Alan Turing	alan@beaconcrm.org	Donor	16 minutes ago
☐	JS	John McCarthy	johnmc@me.com	Volunteer	8 minutes ago
☐	SJ	Grace Hopper	grace@gmail.com	Donor	8 minutes ago
☐	LG	Kathleen Booth	kathleen@gmail.com	Donor	5 minutes ago

02 / Build automation into your CRM

In Beacon, you can use Excel-style formulas to automate your workflows, but it can be tricky to remember the mathematical equations to automate common tasks. And with Beacon AI, you don't need to. Simply describe the sort of result you're looking for, the AI will interpret it into a functional Excel-style equation, and hey presto, anyone on your team can automate the manual tasks they're bogged down in every day.



03 / Write on-brand emails in seconds



As we covered earlier, Beacon AI has in-built functionality to help you spin up amazing, personalised emails to your supporters in seconds. This goes beyond fundraising, you can use this feature across all aspects of your charity - volunteer on-boarding, supporter stewardship, event sign ups, you name it.

These are just the beginning. To keep up to date with our AI developments, [follow this page](#).

“ I'm so impressed with the AI filtering. I spent the first week saying I'll never use it... Now I'm never going to apply a filter manually again!



John Finlayson
@ Suru Partners

Things to be aware of

Like all emerging technologies, AI is not immune to teething problems. In fact, it's likely that AI will never be perfect, and it won't be perfect for every job, either. Here are a few common pitfalls to be aware of.

Hallucinations

It's not uncommon for AI to provide outdated or incorrect information, and even perform erroneous calculations. So-called "hallucinations" are basically instances where AI gets it wrong, and it's thought that this could happen up to 27% of the time. What's worse is that these hallucinations can sound extremely plausible, so even if you don't doubt its accuracy, it is worth double checking important information with an external source.

Data security

As a general rule, avoid entering sensitive or personal information into free, public AI tools, because this information could potentially end up in the public domain. AI companies use your inputs to train their AI, so it is conceivable that whatever you enter could find its way out at some point. Paid applications usually don't use your data in this way, and neither does Beacon, so you can safely enter whatever sort of information you want. In fact, Beacon AI can't even access your data, only the structure of your account, so there's no extra red tape to cut through in order to use it.

Be aware of how AI might be perceived by supporters

CAF conducted some research on how AI is currently being perceived by the general public. Its findings show that on average, the majority of participants in the research said they believed the opportunities outweigh the risks. That being said, trust among supporters is easily broken, so do be diligent in how you deploy this technology into your organisation, and as we said earlier, consider starting small before going all-in.

AI case study: Parkinson's UK

AI isn't just useful in fundraising, charities are using it in all sorts of creative ways. In 2021 as the impact of global lockdowns began to be felt, a study indicated that the third sector would be hit by a downturn. Determined to weather this storm, Parkinson's UK turned to AI to uncover ways in which it could improve service delivery and retain its place as a leader in the sector. Working with an AI agency, the charity utilised a technique called comparative linguistics which studies the use of language to gauge meaning and sentiment. It rolled out this technology across the conversations happening

on its forum, helpline and social media properties. This enabled the team to identify a number of key concerns among people with Parkinson's. Topics such as "how to stay fit" came up again and again, in multiple contexts. This data led to the charity offering physiotherapy sessions via its YouTube channel and other digital channels.

As this case study has hopefully helped to highlight for you – AI has an infinite number of possible applications. As a forward-thinking charity, the only limit is your imagination!



“What would've taken us weeks to do in our old system, we can now do in seconds!”



Gillian Snowden
@ Cosgrove Care

07 /

Wrap up

We hope you're feeling inspired and ready to begin using AI in your charity after reading this guide!

AI will undoubtedly continue to develop at a rapid pace. You don't need to stay abreast of every cool new piece of software that comes on the market, but it's a good idea to keep an eye on how it can help your charity be more efficient and impactful. The third sector, like all other sectors, will continue to be influenced by developments in the AI space. Everything from healthcare to finance, from education to transportation, will be increasingly altered and enhanced by new, intelligent and interconnected technologies such as AI. Now is your chance to take advantage of it and get ahead.

“ We've got everything in Beacon now. All our donors and income. All the records for the people in the organisations that support us. Our appeals, our comms, our events and attendees. We're recording everything. Beacon is comprehensive. It's the brain of our charity!



@COCO

We hope you found this guide useful. Thousands of charities have used Beacon AI to transform how they work, and if you'd like to find out why Beacon is the **#1 rated CRM for charities**, we'd love to hear from you so please do get in touch!

Get in touch ≡



Chris Houghton
CEO @ Beacon