

# Generative AI: a powerful tool for charities

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# Your speakers



## **Ben Bilisland**

**Partner, Head of Technology Industry**

**E:** [ben.bilisland@rsmuk.com](mailto:ben.bilisland@rsmuk.com)

Ben is RSM's Head of Technology Industry. He leads our work with clients in this key industry and a key part of his role is ensuring that you feel supported as an RSM client. This can include broader conversations to explore industry trends, challenges and opportunities we are seeing across the industry and economy.



## **Sarah Belsham**

**Partner, Data, Analytics and Insights**

**E:** [sarah.belsham@rsmuk.com](mailto:sarah.belsham@rsmuk.com)

Sarah has over 25 years of experience in delivering technology and digital transformation programmes. Sarah is responsible for RSM's data, analytics and insights consulting services as well as leading the firm's Data and Analytics Innovation Programme. She understands the challenges faced by organisations trying to drive value from their data assets, including implementing effective AI solutions, and develops data strategies that align to business and digital strategies.

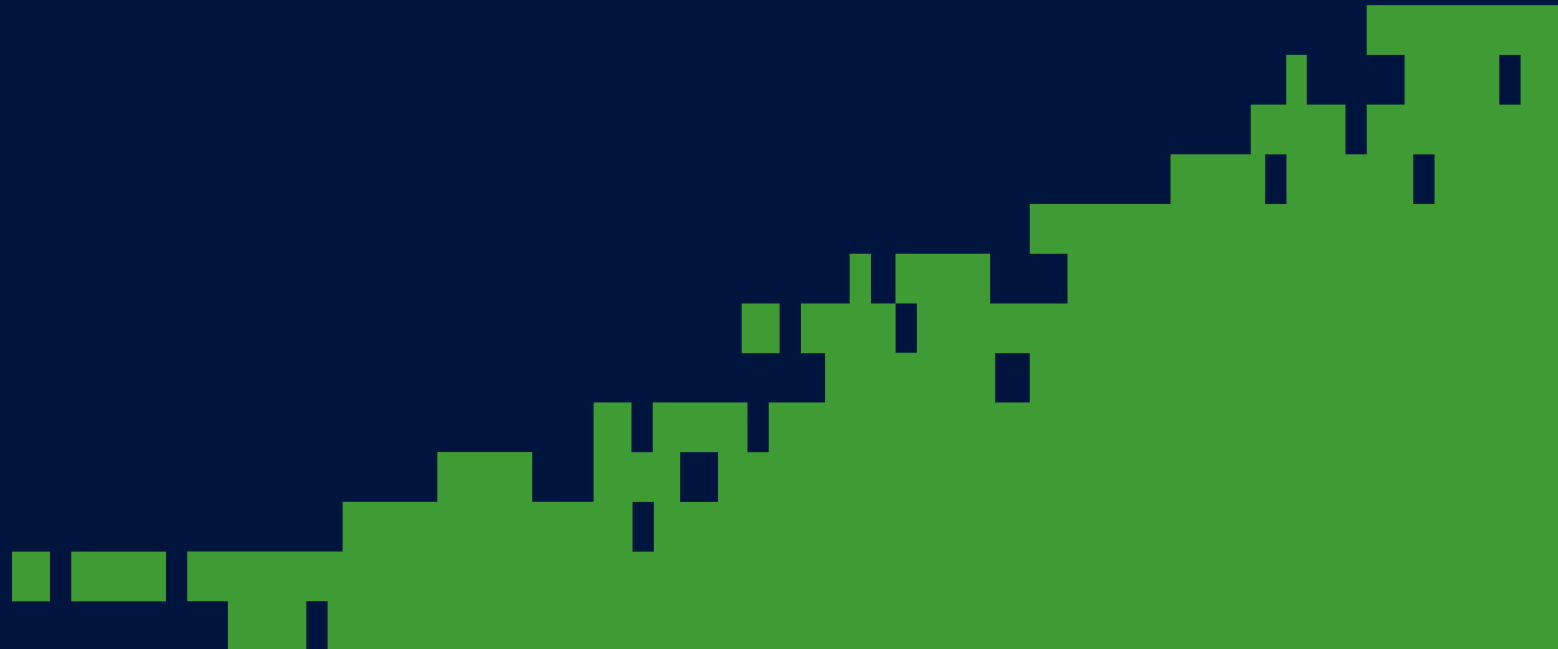
# Topics

- 01 Developing a future fit charity
- 02 Introduction and generative AI trends
- 03 AI capabilities and opportunities for charities
- 04 Getting started with AI and the need for a strategy
- 05 AI risks and mitigations

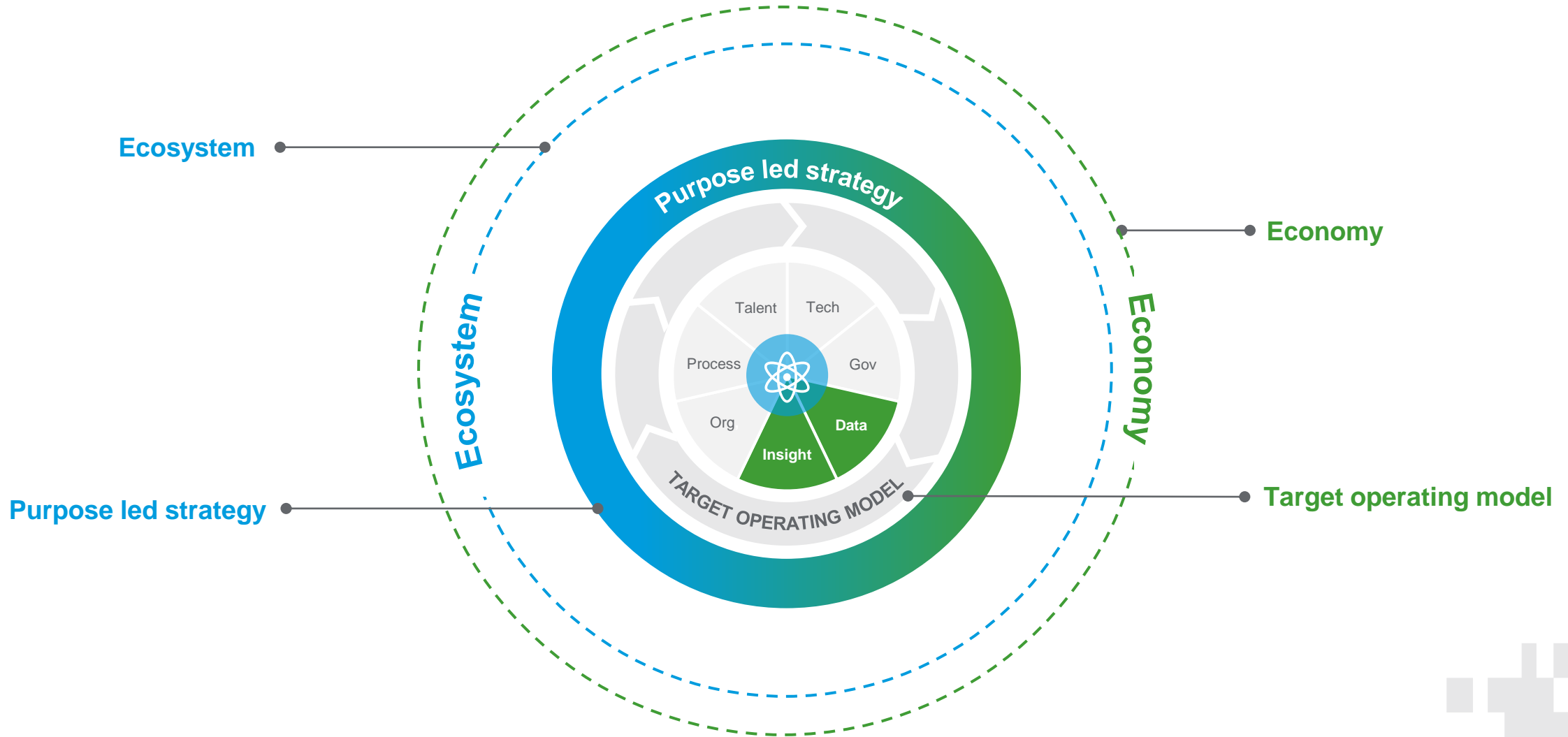
“  
Taking a data-driven approach to digital transformation is essential. A good foundation in data analytics is often the best place to start as it develops crucial skills that can be valuable for future investments and can also make a real difference to the quality of decision-making in the organisation.  
”

# 01

## Developing a future fit charity

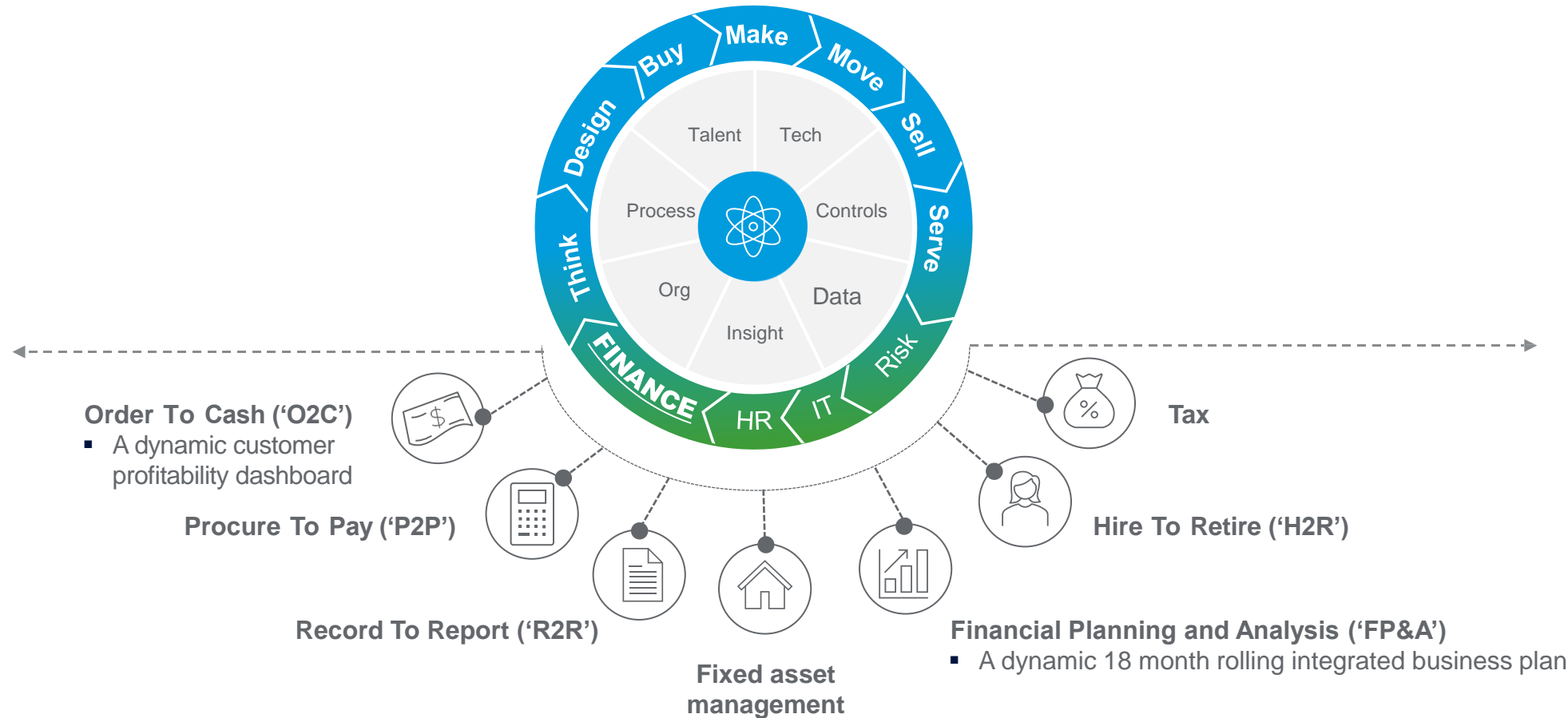


# Strategic framework for evolving your charity



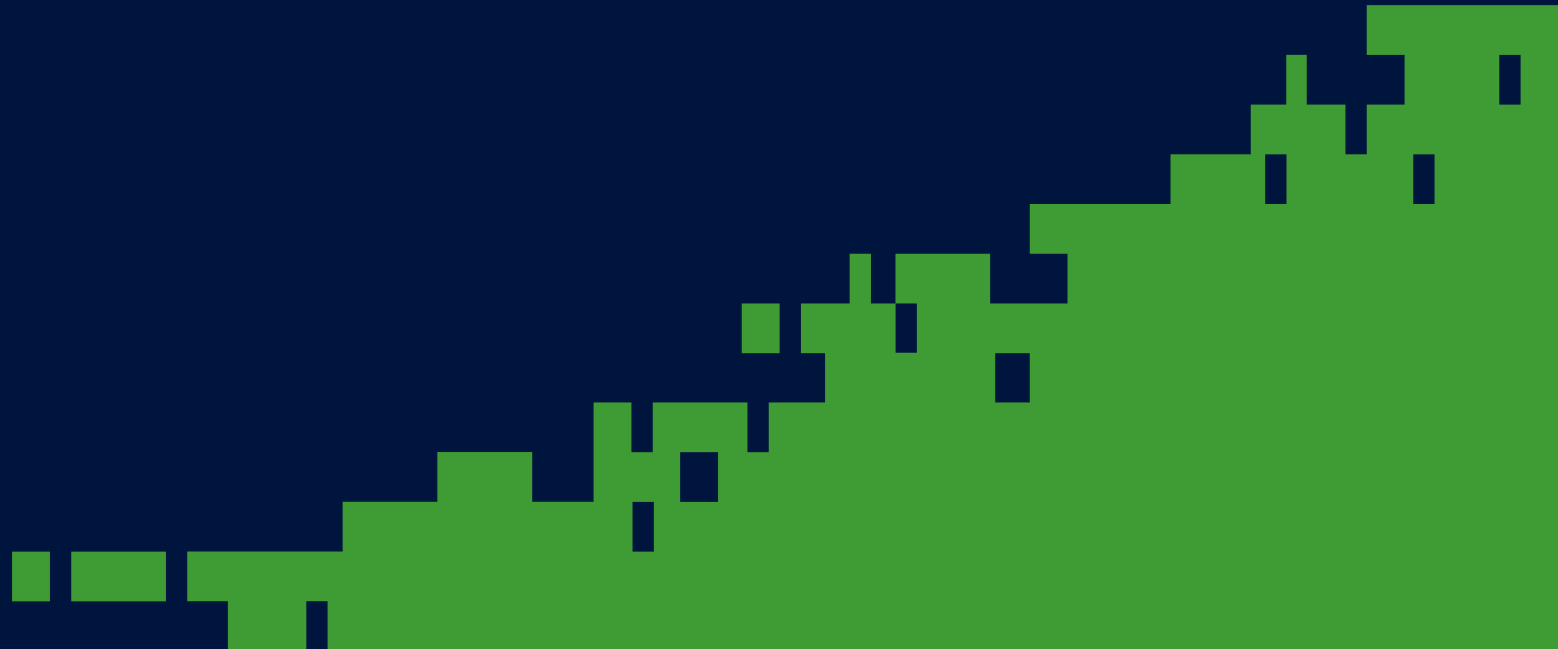
# Developing data led capabilities

A focus on value-driven processes, with their key performance drivers, is critical to achieving the target operating model.



# 02

## Generative AI trends



# Poll question one: To what extent is your charity using generative AI?

- We are actively using Gen AI.
- We have not yet implemented Gen AI but are planning to do so.
- We are struggling to find use cases for Gen AI.
- We have no immediate plans to do so.



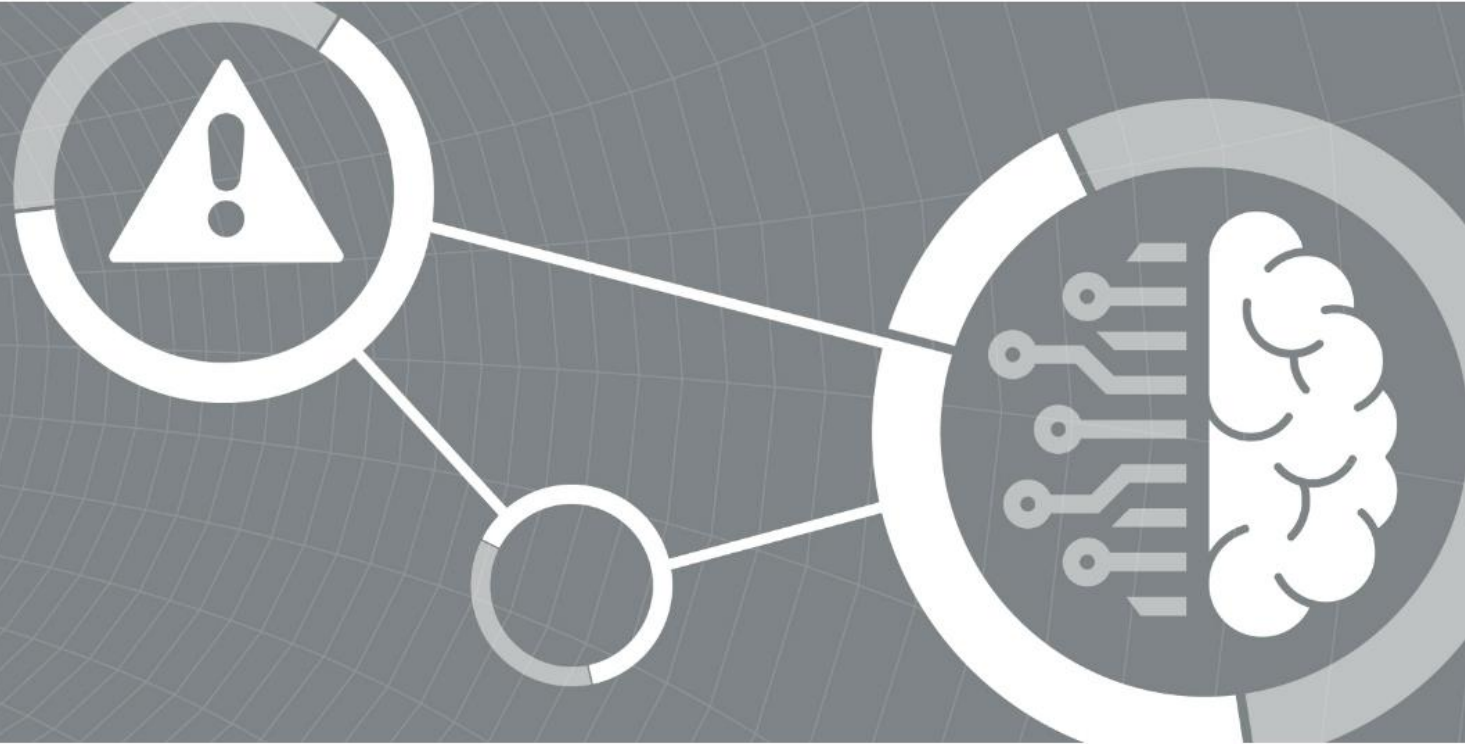


# Generative AI | The Real Economy | RSM UK

HOME / INSIGHTS / REAL ECONOMY / GENERATIVE AI

The Real Economy

Generative AI



Generative AI took the world by storm back in 2022 with the launch of ChatGPT. Since then, much has been discussed on the technology and the potential impact it will have across businesses and industries. As the hype around the technology fades and reality of the task of understanding and leveraging this technology sets in businesses are exploring how to use the technology to best affect in their organisations.

In the wake of this seismic impact of generative AI we asked out panel of middle market business leaders about how they are using the tool, where they feel it will help them most and where they believe the risks lie.

With data collected from the heart of the middle market our data and commentary offer an insight into how

# The middle market have embraced generative AI

45% of middle market businesses are using generative AI in at least one area of their business.

45%

A further 37% said that they were experimenting with the technology.

37%

68% of the business leaders surveyed said they had used a generative AI tool themselves to support their business.

68%

Only 6% said they have no plans to use it in the future.

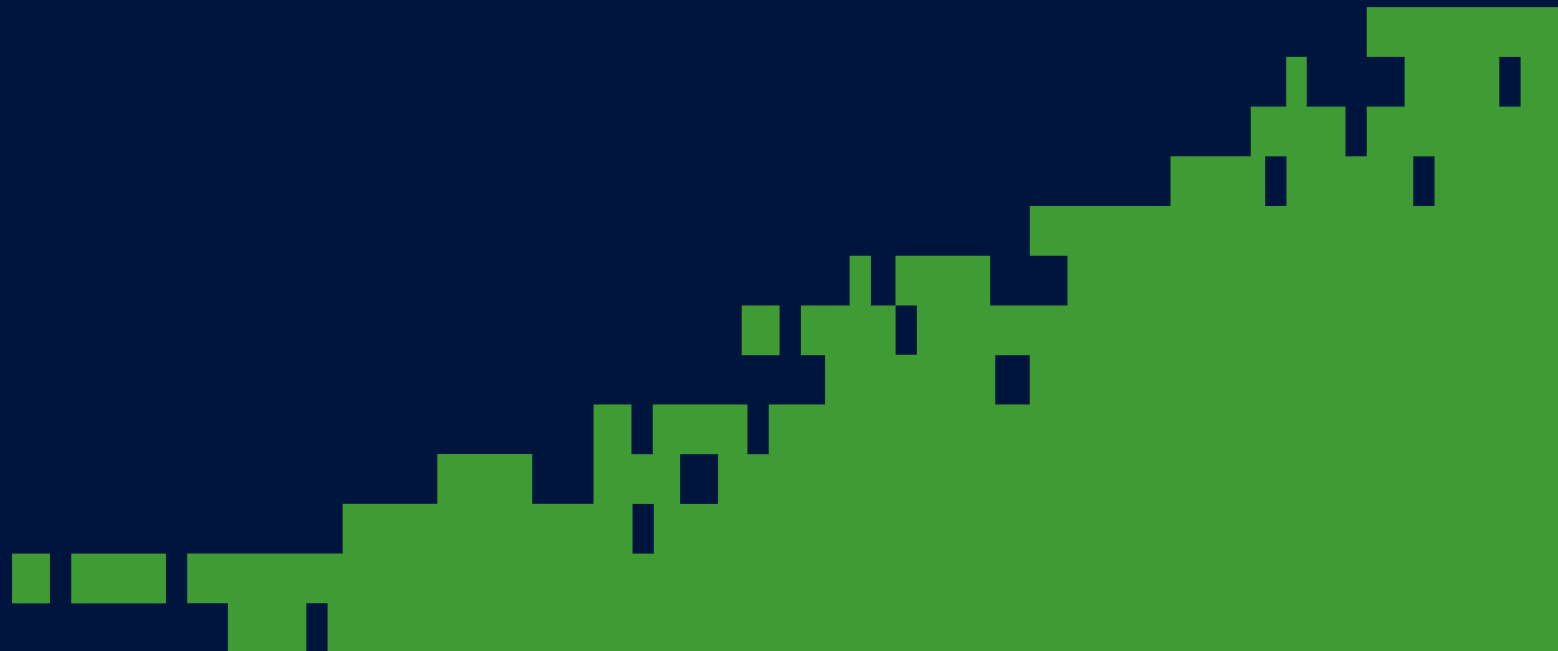
6%

78% of charities agree that AI is relevant to their charity and could transform it, yet 73% say they don't feel prepared to respond to the opportunities and challenges it brings.

78%

# 03

## AI capabilities and opportunities



# The growth of AI

Only **27%** of charities are using AI with **26%** not currently using it but planning to in the future.

**27%**

**78%** of charities agree that AI is relevant to their charity and could transform it.

**78%**

**66%** of charities in 2023 are interested in making the best use of emerging tech such as AI and ChatGPT. Only 15% were interested in emerging technologies in 2022.

**66%**

**52%** want to look into AI more but are constrained by lack of time, resources and skills, whilst **42%** are trying to get colleagues to engage.

**52%**

**64%** of large charities are currently using or plan to use AI in their day-to-day operations, compared to **44%** of small charities.

**64%**



# AI capabilities

## Traditional AI: Perform tasks intelligently



**Predictive analytics**



**Classifying**



**Anomaly detection**

## Generative AI: Create new content



**Research**

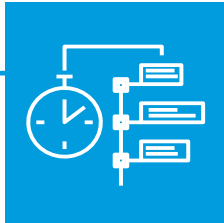


**Content and image  
creation**



**Text summarisation**

# Impacts



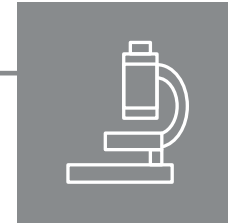
## Increased efficiencies

- AI technologies are optimising processes throughout the value chain.
- Enabling organisations to be proactive instead of reactive.
- Increasing employee productivity.



## Supporter Experience

- Understanding supporter conversations and sentiments.
- Targeted campaigns.
- Enhanced supporter services through use of chatbots.



## Innovation

- Developing new technology solutions.
- Better supporting charitable purpose.
- Partnering with technology partners.

# Examples of AI use cases for charities

Successful AI is dependent on identifying use cases with clear end goals. There are many use cases where generative AI or traditional AI can be introduced.

01

## Text extraction and analysis / summarisation

Analysis to identify topics and themes being discussed in on-line communities

Extract and summarise terms and conditions from contracts / summarise complaints

02

## On-line document or article review / document creation

Review of online documentation and summarisation of impact on charities

Drafting emails and reports

Drafting marketing material and social media posts

03

## Predictive analytics

Targeted fundraising based on prior donations, reducing marketing spend as well as increasing donations

Analysis of supporter actions to drive improved retention of supporters and increased donations

04

## Chatbots and search engines

Deployment of chatbots and virtual agents to guide donators through an appeal story and complete a donation

Internal search engines to speed up access to information and improve process efficiency

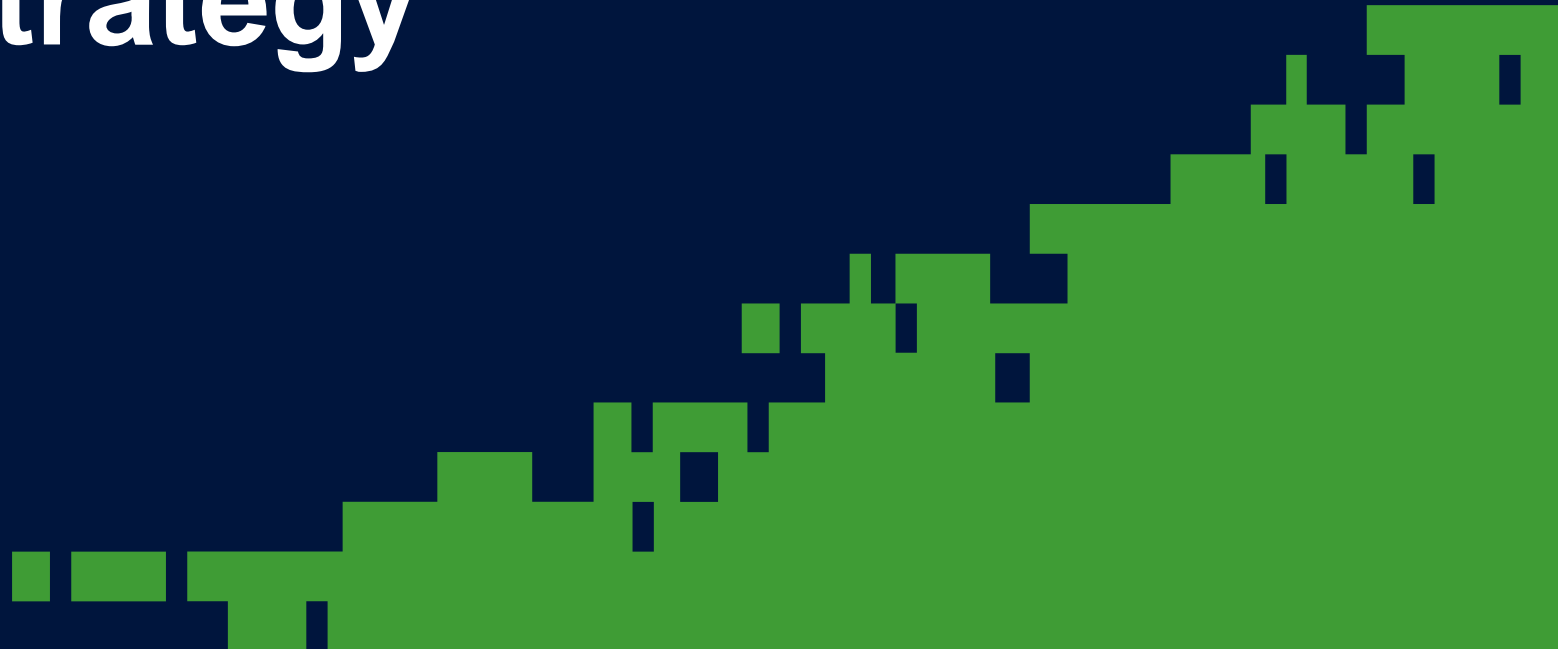
# Poll question two: Where does your charity see the most value from generative AI?

- Improving the supporter experience.
- Increased donations.
- Internal productivity/efficiency gains.
- Creation of marketing material and social media posts.
- Improved decision making based on trends.



# 04

## Getting started with AI and the need for a strategy



# Components of an AI strategy

Deployment of successful AI requires a clearly defined strategy underpinned by your vision for AI, concrete **use cases** and reliable **data**.



**Purpose led**



**Use cases**



**Data**



**AI strategy**



**Technology**



**Org and talent**

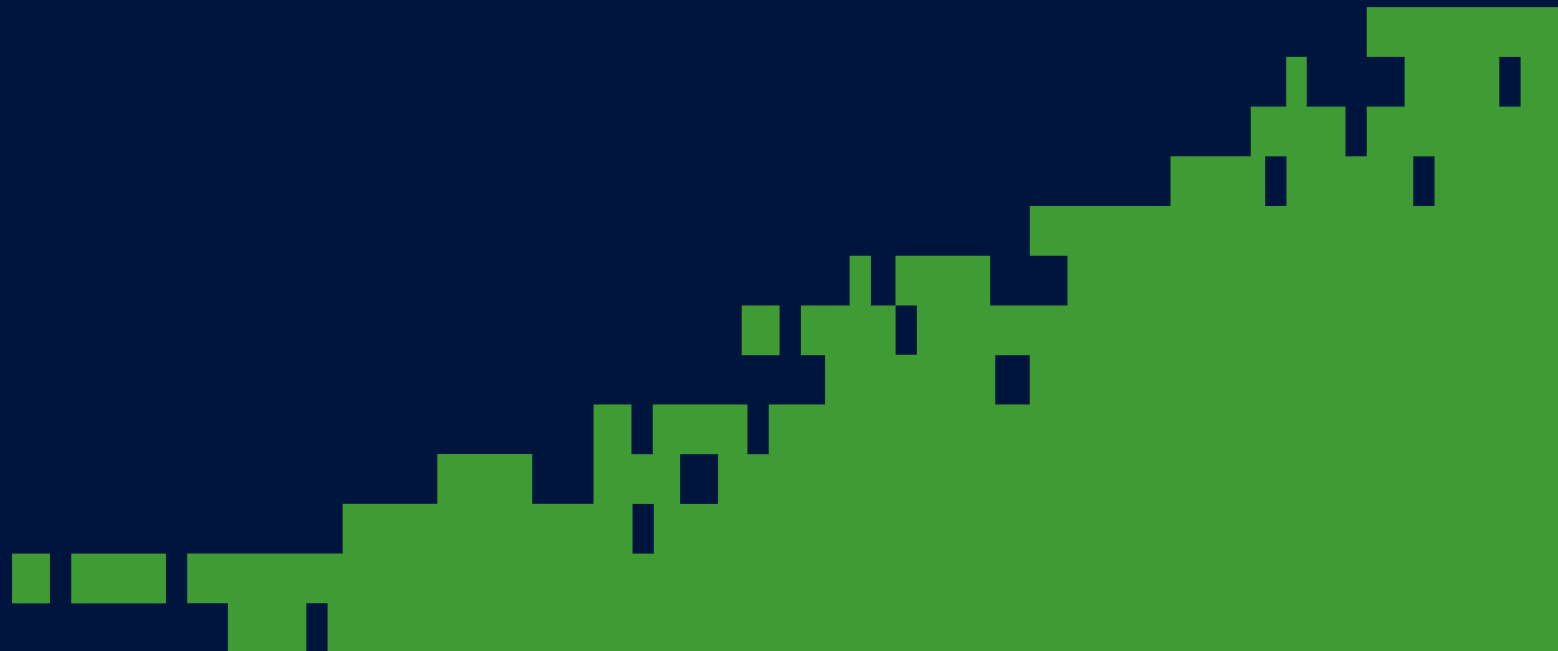


**Governance**



# 05

## AI risks and mitigations



# Poll question three: what is your biggest barrier to implementing generative AI?

- Lack of skilled personnel.
- Internal resistance.
- Data quality and availability.
- Cost of implementation.
- Integration with existing systems and processes.
- Regulatory/compliance concerns.

# Navigating risk

Although excited about the opportunities generative AI offers, the associated risk is still at the forefront of many businesses' decision making.

63% felt generative AI could be a threat to their business to at least some extent.

63%

73% of charities say they don't feel prepared to respond to the opportunities and challenges AI brings.

73%

47% said they had major concerns around data security and privacy arising from the use of generative AI.

47%

58% of businesses said they already have a generative AI policy in place.

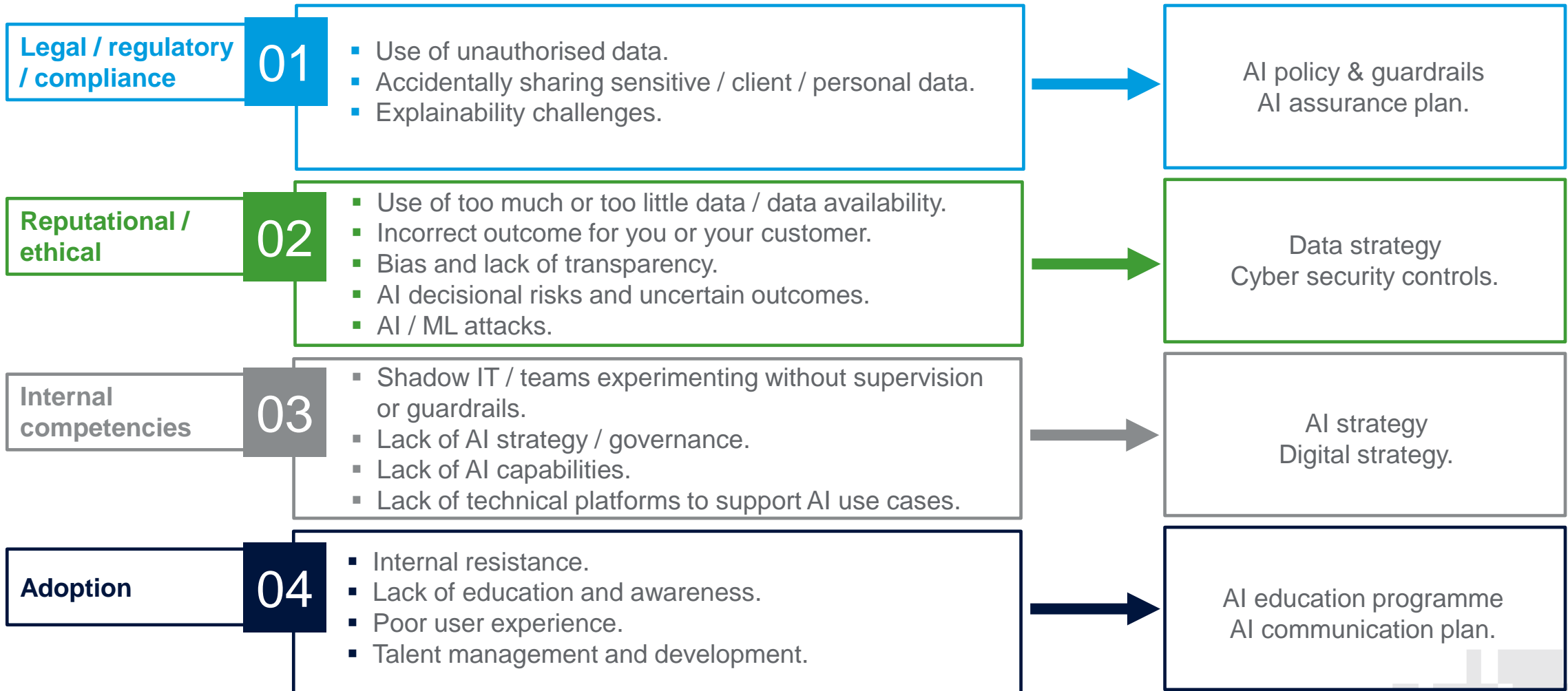
58%

32% of businesses are in the process of putting a generative AI policy in place.

32%



# AI and ML risks and how to mitigate against them



# Key takeaways

1

Identify and prioritise use cases.

5

Celebrate your achievements.

2

Start small and build momentum.

6

Leverage existing platforms.

3

Make sure you have the data you need.

7

Put in place policies and guardrails.

4

Take your teams on the journey.

8

Develop your teams skills.



# Charity trustee insights hub

RSM's hub offers charity trustees clear guidance, support, and reassurance. It covers the following key topics:

- reserves;
- impact reporting;
- finance function;
- risk/governance; and
- people.

**Scan the QR code to view**



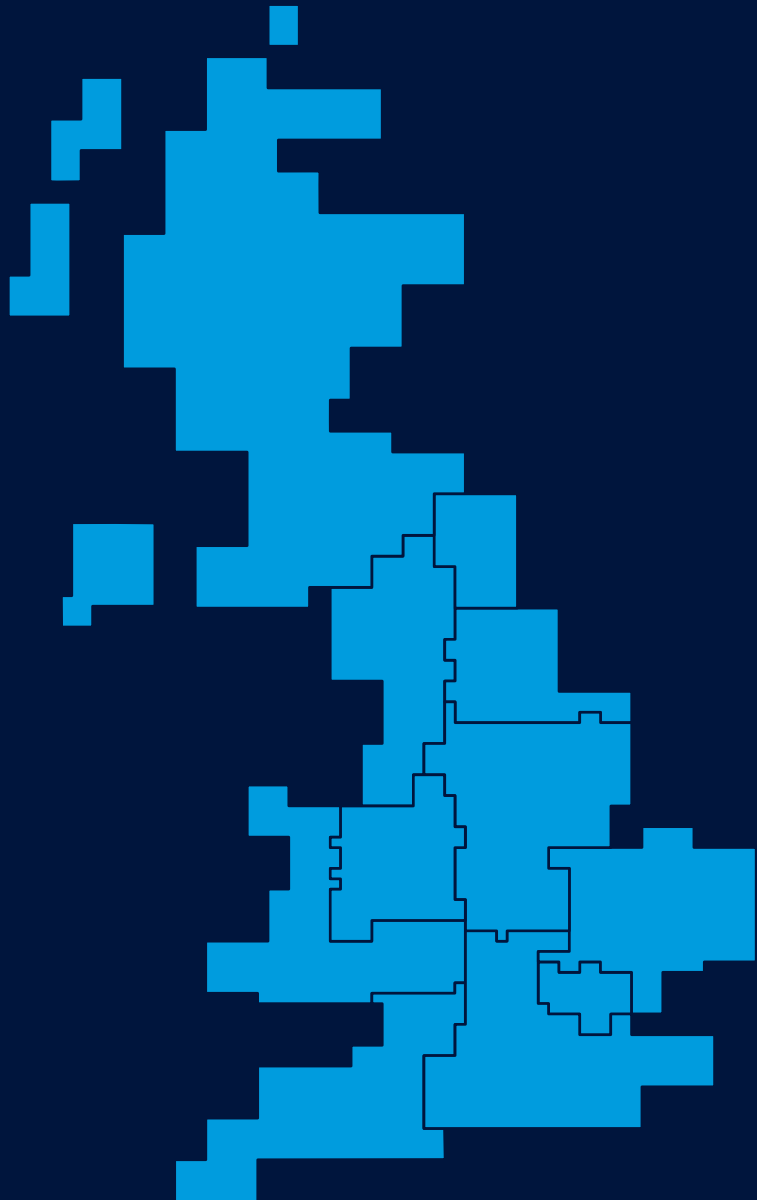




# Select your preferences

- **Scan** this QR code **OR** visit [www.rsmuk.com/preferences](http://www.rsmuk.com/preferences)
- Fill in your basic details
- Select your areas of interest and then **click submit**





## RSM in the UK

**4715**  
People

**360+**  
Partners

**30**  
Locations

**>£486m**  
Revenue

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