



CFO Briefing

How not-for-profits can gain value with AI

Artificial Intelligence (AI) presents not-for-profit (NFP) organisations with a significant opportunity to reduce operational costs, free up valuable staff time, and ultimately enhance the support provided to beneficiaries, supporters, and society.



At Clarasys, we specialise in guiding NFP organisations through practical, low-risk steps, leveraging our AI expertise to pinpoint where it can make a real difference and help with implementation. Our deep understanding of the sector, formed from years of experience working with global NFPs, has allowed us to easily manoeuvre through the noise of AI to get to the crux of solving some of the biggest challenges.

Where can AI help you right now?

According to the Charity Digital Skills Report 2025, almost two-thirds (64%) of charities are either struggling with, or are not using AI tools. Our work begins with a forensic look at the AI that is already in-house, such as Microsoft Copilot, but isn't being used to its full potential.

Swift, cost-effective wins are vital for demonstrating tangible value to the board, staff, volunteers, beneficiaries, and most importantly, funders, reinforcing confidence in your financial stewardship.

When new AI technology is required, prioritising out-of-the-box solutions can significantly reduce both complexity and overall cost, circumventing the expensive and time-consuming process of building bespoke systems from scratch.

As with any technology, there are risks involved with AI, so implementing guardrails is extremely important. We have seen employees and volunteers inadvertently breach information security policies when they haven't been given the right user advice. Ensuring your charity is GDPR compliant when using AI is a key foundational step.



Immediate opportunities for AI-driven efficiencies

AI can provide substantial benefits across various functions, directly impacting your charity's financial health and operational effectiveness.

Transcription	Knowledge management and voice AI	Intelligent donor personalisation
<ul style="list-style-type: none"> • Fundraising and grants: Qualification and automated drafting of grant proposals and bid responses can drastically reduce the extensive time and effort typically expended by fundraising teams, potentially increasing the volume and success rate of applications, thereby securing more funding. • Multilingual support: AI-powered translation tools allow for materials to be rapidly translated for diverse communities, dramatically increasing accessibility and reach without the need for additional headcount or substantial external translation costs. • Note taking and summarisation: For tasks such as taking customer notes and actions, interviews, and compliance documentation, AI can save hours of manual effort across multiple teams, directly impacting labour costs and improving data accuracy. 	<ul style="list-style-type: none"> • Search capabilities: Introducing intelligent search capabilities and knowledge assistants can uncover hidden insights from existing data and significantly reduce duplication of effort across departments, boosting productivity and cutting down on wasted time and resources. • Volunteer management: Streamlining processes through AI-assisted onboarding flows, comprehensive FAQs, and automated schedule management directly saves administrative time, allowing for more effective scale-up of volunteer programmes without proportionate increases in overhead. • Beneficiary support: Implementing chatbots for initial triage and voice AI for intelligent call routing and diagnostics can significantly lower inbound query volumes and improve the precision of targeting support, leading to more efficient use of staff resources and reduced operational costs associated with call centres. 	<ul style="list-style-type: none"> • Targeting: Consolidating donor data (which often lies across multiple systems and departments) allows NFPs to gain a full view of their donors and to correctly target those individuals who might be open to cross selling, increasing donations, or becoming legacy donors. AI allows a more focused approach, which will not only be more likely to lead to success but will reduce budget spent on broad brush marketing campaigns. • Donor engagement: Leveraging AI to generate personalised thank you messages, tailored content, and self-serve insights for donors reduces the communications workload and also enhances the donor experience, fostering stronger relationships that can lead to increased long-term financial support and retention.

Your strategic path to practical AI adoption

Embarking on an AI journey requires a structured approach to ensure maximum value and minimise risk:

- **Assess:** Begin by understanding where AI is already in use within your charity and what existing tools, such as Copilot or Gemini, are available and potentially underutilised. This prevents redundant investments and leverages current assets.
- **Discover:** Map out precisely which areas of your operating model stand to benefit most, focusing on critical functions like beneficiary service provision, fundraising or volunteer management, to identify potential high-impact applications.
- **Prioritise:** Identify quick-win use cases that offer clear time or cost savings and, crucially, align directly with your charity's mission. This focused approach provides early successes and builds internal momentum.
- **Pilot:** Launch small-scale, low-risk pilots using off-the-shelf tools to prove the concept and measure tangible results. For example, a successful implementation of Glean (an AI knowledge management tool) achieved an 82% adoption rate within just seven days for one client, demonstrating rapid value and user acceptance.
- **Govern:** As a CFO, addressing risks is paramount. Proactively tackle concerns such as shadow AI, data governance, the potential for skill erosion, and compliance requirements. Establishing robust governance frameworks not only mitigates financial and reputational risks but also ensures you are ahead of the Charity Commission's evolving expectations.

Expert support for your AI journey

We offer targeted support designed to help achieve your goals:

- **Current-state AI assessment:** Gain a clear understanding of where AI is already embedded in your charity and how it can be leveraged more effectively to maximise existing investments.
- **AI cost-saving pilot:** We can help you design and deliver focused AI pilots specifically aimed at identifying quantifiable savings, improving efficiency, and building internal confidence in AI's capabilities.
- **Scaling sustainably:** Receive expert support on how to move beyond a pilot, using established delivery frameworks to drive value at scale across your charity - whilst ensuring a secure and ethical AI implementation.
- **Employee readiness:** We look at how ready your people are for change, whether there is any resistance to AI, and offer tailored solutions to adoption challenges.

Contact us via AI@clarasys.com to discuss how AI can strategically benefit your NFP organisation.