

A HOW-TO GUIDE

# AI Cheat Sheet Toolkit for Charities



Tools, truth, and  
templates for small  
charities with big missions.

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## FOREWARD

# From Seema, With Purpose...

**Hi, I'm Seema, founder of Legacy Group Consultancy, Muslim woman, mother, and recruiter with a cause.**

If there's one thing the charity sector has taught me, it's that purpose-led work is built on heart... but it survives on innovation.

And right now, we're standing at the doorstep of one of the biggest shifts our sector has ever seen: AI. Not the scary, sci-fi kind, but the practical, time-saving, capacity-building kind that can genuinely change the way our communities operate.

I put this toolkit together because charities are doing some of the hardest, most beautiful work in our society – often with the smallest teams and the tightest budgets.

This cheat sheet is a starting point.

My hope is that it gives you a spark, a new idea, a new system, a new confidence to explore AI in a safe, ethical and values-led way.

Whether you're a small grassroots organisation or a major charity, I pray this resource helps you save time, elevate impact, and move one step closer to the vision you're here to serve.

With purpose, intention and belief,



# What this toolkit is

*(and isn't)*



What This Toolkit Is:

Practical Starting Point

Time-Saver for Busy Charity Teams

Curated Resource for Muslim and Non-Faith Charities

Companion to Your Existing Expertise

Sector-Strengthening Contribution

This toolkit is not:

Not a Technical Manual

Not a Replacement for Human Insight

Not a One-Size-Fits-All Solution

Not a Substitute for Governance or Compliance



## SECTION 1

# Where AI Can Help Your Charity Immediately: An Introduction to AI

Artificial intelligence is becoming one of the most valuable tools for charities looking to do more with limited time, budget, and capacity. Far from replacing the human relationships. AI works behind the scenes to remove admin, surface insights, and help teams focus on the work that truly matters.



By analysing supporter behaviour, automating repetitive tasks, and improving decision-making, AI can enhance fundraising performance, deepen donor engagement, and streamline internal operations.

Whether you're looking to grow community events, strengthen regular giving, secure more grants, or improve organisational efficiency, AI offers practical, accessible solutions that can be tailored to charities of any size.



For organisations guided by compassion, stewardship, and service to community, AI offers a way to honour these values: by reducing waste, strengthening relationships, and freeing teams to focus on meaningful work.

From a Muslim perspective, adopting technologies that enhance *ihsan* (excellence), *amanah* (trust), and *barakah* (using resources responsibly) aligns with good governance and ethical leadership.

AI helps charities uphold these principles by improving transparency, increasing efficiency, and ensuring every donation is used wisely and with purpose. Supporting community fundraising, developing regular giving programmes, securing trusts and grants, or improving internal operations, AI empowers charities to deliver greater benefit with integrity, compassion, and long-term sustainability.

# Where AI Can Help Your Charity Immediately: 4 Key Concepts

## Community Fundraising:

- Automate supporter replies on WhatsApp/Messenger for FAQs, event info & sign-ups.
- Generate ready-made campaign page templates for walks, runs and local challenges.
- Create event promo materials (posters, reels, emails) instantly in your brand style.
- Identify engaged local groups/areas to target for maximum turnout and impact.



## Regular Giving:

- Personalise donor journeys with AI-guided emails, messages, and touchpoints.
- Predict donor lapse risk and trigger early retention actions.
- Optimise donation pages with smart suggested amounts and layout testing.
- Auto-generate monthly impact updates tailored to each supporter.



## Trusts & Grants

- Research funders instantly and match opportunities to your projects.
- Draft first-pass applications to save hours of writing time.
- Extract deadlines & deliverables directly from guidelines and award letters.
- Build automated grant calendars & follow-up workflows to stay on track.



## Internal Operations

- Summarise meetings and transcripts into clear next steps.
- Draft policies, job descriptions & reports in minutes.
- Create faster social media content with on-brand copy and visuals.
- Help build project plans and task lists to streamline delivery.



## SECTION 2

# Tools to Use (Simple, Affordable, Effective)

**AI tools help charities do more with less: boosting donations, securing grants, and streamlining operations, so your team can focus on making a real impact in the community. Here are some tools:**



### Community Fundraising

- ★ *Raisely* – AI-assisted campaign & page builder
- ★ *Tilly* – AI donor chatbot for websites/WhatsApp
- ★ *Givebutter AI* – generates appeal content + event pages

### Regular Giving

- ★ *Fundraise Up* – optimises donation pages with AI
- ★ *Enthuse* – UK-based, donor personalisation tools
- ★ *GoodHuman AI* – donor retention & engagement modelling

### Trusts & Grants

- ★ *Instrumentl* – AI grant prospecting + tracking
- ★ *Grantable* – AI writing assistant for grant drafts
- ★ *Breezy Grants* – finds relevant trusts & foundations

### Internal / Cross-Charity

- ★ *ChatGPT* – content, strategy, reports, templates
- ★ *Notion AI* – knowledge hub + automated summaries
- ★ *HubSpot CRM + AI* – donor management + comms
- ★ *Canva AI* – design support for posters/social

## SECTION 3

# Best Practices for Muslim Charities



**Using AI in your charity work can boost efficiency and reach but it's important to stay true to your values.**

**By combining technology with principles like amanah (trust), barakah (blessing), and sadaqah (charitable giving), you can communicate transparently, act ethically, and protect the dignity of your donors while still working smarter.**

### مسجد Align AI with Islamic Values

- Be transparent with donors ("Some communications are AI-assisted and reviewed by our team").
- Prioritise **accuracy**, honesty, and integrity in content – no exaggeration of impact.
- Protect donor dignity when telling stories; avoid sensationalism.

### 👤 Culturally Aware Messaging

When writing appeals with AI:

- Add a line about community, sadaqah, barakah, amanah.
- Review tone to ensure it's compassionate, not transactional.
- Train AI with examples of your organisation's voice.

### 🛡 Guardian of Trust (Amanah)

- Follow GDPR strictly.
- Avoid uploading sensitive donor data into AI systems.
- Use AI internally for drafting – not storing people's private information.

## SECTION 4

# AI Safety Checklist for All Charities

**AI can be a powerful ally but only if it's used responsibly.**

**This checklist helps charities safeguard donor data, maintain human oversight, and ensure technology strengthens trust and empathy rather than replacing it.**



### Before using AI ask:

#### 1. Are we protecting donor data?

Never paste private details (names, bank info, stories without consent) into AI tools.

#### 2. Are we keeping human oversight?

AI drafts to Human edits to Human approval.

#### 3. Are we transparent with donors?

Donors don't need every detail, but clarity builds trust.

#### 4. Does this increase empathy or reduce it?

AI should enhance relationships, not replace them.

#### 5. Will this save us time or make things complicated?

Start with one task, don't overhaul everything at once.

## SECTION 5

# Quick Templates for Everyday Use



**Use AI to save time while keeping your communications warm, clear, and donor focused. These prompts help craft appeals, “thank you” messages, grant summaries, and impact reports, all in a compassionate, human, and transparent tone.**

### **Appeal Email (AI Prompt):**

“Write a warm, community-focused appeal email about [project].

Tone: compassionate, human, simple.

Audience: Muslim/non-faith.

Include: impact statement, short story, clear call-to-action.”

### **Monthly Donor Thank-You (AI Prompt):**

“Write a heartfelt thank-you message for monthly donors about the impact of [programme]. Keep it short, relational and appreciative.”

### **Grant Summary (AI Prompt):**

“Summarise this grant application into bullet points: goals, beneficiaries, expected impact, budget.”

### **Impact Report Paragraph (AI Prompt):**

“Draft a 150-word impact paragraph based on these outcomes: [list outcomes]. Tone: optimistic, transparent, donor-friendly.”

## SECTION 6

# What AI Can't Replace (and never should)

### The Heart of Charity

AI can support your work, but the true impact comes from human connection.

Spiritual intention, authentic stories, lived experience, and ethical leadership build trust and strengthen community bonds, reminding us that technology is a tool, and people are the heart.

A checklist of what AI should not replace:

**Human connection:** Strengthen bonds between donors and community.

**Spiritual intention:** Let purpose and faith guide your work.

**Authenticity:** Highlight lived experience, emotion, and real stories.

**Leadership & values:** Make decisions grounded in integrity and compassion.

**Community trust:** Build credibility through transparency and care.

**Remember:** AI is the tool, you are the heart.



## SECTION 7

# Next Steps for Your Charity (Easy, 30-Day Starter Plan)



## What Are The Next Steps for Your Charity?

Get started with AI in just 30 days. This easy, step-by-step plan helps your charity explore writing, donor journeys, grant research, and ethical policies, turning small actions into big impact.

### Week 1 – Use AI for writing

Draft appeal emails, social posts, and internal policies.

### Week 2 – Build donor journeys

Predict donor engagement for smoother giving experiences.

### Week 3 – Test AI

For grant research and drafts, submitting high-quality proposals.

### Week 4 – Create an internal AI policy

Establish best practices so your team uses AI confidently and responsibly.

### Small steps = Big impact

One week at a time builds skills, strengthens processes, and shows tangible results while keeping human values at the heart of your work.

## SECTION 8

# AI for Charities: Your Complete Guide

AI can help your charity work smarter, not harder. Across community fundraising, regular giving, trusts & grants, and internal operations, technology can automate routine tasks like donor replies, social posts, and report drafting and much, much more as detailed throughout this leaflet.

Aligning AI with values means using AI responsibly. Guiding one's self with Islamic principles: amanah (trust), barakah (blessing), sadaqah (charity) will ensure that you are transparent with donors, protect data. AI enhances empathy and human connection but should not replace it, remember AI is the tool, you are the heart.

A Personal Note from the Founder – Seema:

I spent years working in recruitment companies, helping organisations grow, but I realised my passion lay in supporting charities to make a real difference. That's why I founded Legacy Group Consultancy.

At LGC, we work with charities to make a real difference and inspire others to do the same. This leaflet explores how charities can harness AI ethically and effectively, ensuring technology strengthens human connection, values, and impact.

My mission is simple: help your team work smarter, stay true to your purpose, and achieve lasting change in the communities you serve

point of view  
Legacy  
gift of proper

# CONTACT US

If you would like further information or any help with your recruitment needs, get in touch with us.

