

Yorkshire Funders - AI and grant making

13th March 2025 online

Training delivered by:

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Webinar overview

This session seeks to make you better informed about the opportunities of AI and how they work in practice, and to consider and reflect on the challenges and how you might overcome them so that you are able to harness these new technologies to create better outcomes for our communities.

Session Summary

The meeting presentation contains lots of links to useful resources – these and those mentioned below during the session will also be put on the resources section of our website.

Poll results from session introduction:

Have you used AI in your personal life, at work or both? Personal 13%, Work 25%, Both 62%
Have you talked to your trustees about AI and its impact on your work? Yes 42%, No 58%

There are lots of products on the market being developed – whether they are good or bad is open to question. Chat GPT is widely used by those on the call.

Top tips/resources added to the chat or raised during the introductory discussion

A member did the CAST online training course recently and found it very interesting. They tried the Gamma presentation tool which throws out slides to you. However, the images it gave really weren't appropriate and were very "AI". ChatGPT has also thrown up information that they know to be incorrect therefore it's making them nervous. <https://www.wearecast.org.uk>

A member reported that Charity Excellence has helped groups write 6,000+ bids through their AI. They use Chat GPT to help groups write objects to get charity registration – it's really helpful.

A useful due diligence tool for charities that uses AI <https://www.givingisgreat.org/>

Gamma is a tool for writing presentations. You have to sign up but if you use the basic package, it is free ([Gammas – Gamma](#)).

This is an AI detector that is useful – [Advanced AI Checker for ChatGPT, GPT-4 & More](#).

Claude is very useful for summarising documents. A member asked it to summarise a very large and heavy read and it did this in a very clever way. They asked it to summarise for a 10-yr-old and thankfully they could understand it!

Several members want to use AI to help with due diligence, as they think there is a real time-saving benefit there.

A member recommended AI for images to go on slides for presentations. They also use for refining feedback letters to unsuccessful applicants. They find AI good for pitching at the right level but it needs sense checking on occasion.

Concerns / worries raised during the introductory section

Members generally worry that AI could dehumanise the grant process and that small groups may be disadvantaged again as they might not use AI well.

A member also raised the environmental impact of using AI – Chat GPT uses 10x more electricity than a google search.

AI opportunities slide

Lots of statistical websites use AI. Lots of people use Chatbox to engage donors using AI

A member reported using AI to help develop safeguarding policies to ensure they meet criteria as well as helping to develop AI policy.

AI threats slide

Chat GPT is effectively a huge search engine going out there and finding things but is only as good as its latest update. It depends on the accuracy of the information out there – is it biased? Be careful with personally sensitive data – re sharing information about individuals etc.

Would ChatGPT become a biased tool if bought by the wrong people?

Humanity still has a place – we wouldn't want all grant applications to look the same.

The prompts you ask ChatGPT are very important to the quality of response received. Learning how to feed it well is a process in itself.

Breakout groups considering 3 questions – summary of feedback comments from the five different groups

What AI tools or methods could improve how we manage grant applications and other aspects of our work as funders?

What AI tools or methods exist or would we like to see that could improve the process of applying for grants for our applicants?

How could AI help us better understand the needs of the communities we serve?

One funder reported receiving 1,000 applications in two weeks which they are looking to turn around quickly – a key tool would be something where you could feed charity numbers in and it would tell you whether they meet criteria, issues of fraud, have they been reporting OK etc.

The group still felt they were a long way away from feeling confident AI can check basic eligibility, let alone doing the full evaluation and decision making. Worried about bias.

They also questioned how an AI model would be able to look past applications that may not be as well written.

AI learns and is getting information from the internet but can't go into accounts and see the list of grants given. If we put grants awarded on our websites/360 giving, this will give AI tools visibility. We need to share as much information as we can for AI to pick up.

How can we use AI to help with due diligence? – there are biases out there – one organisation a member had looked at on giving is great didn't have as good a score as expected because it had a stable board which had been interpreted negatively – how will AI interpret things and the biases that sit within the AI model?

It would be useful if it could help with due diligence – e.g. throw accounts in and it will tell you whether it's a healthy organisation or not. But where are the boundaries with other people's information?

Mapping – indices of deprivation – it would be great if AI was completing maps based on wards and postcodes to drill down into data.

When used by applicants, is ChatGPT creating better applications than they would have created themselves? Not necessarily.

A member is using currently in background tasks on background data. Not using it for decision making and wouldn't feel comfortable doing so. Testing and learning as they go.

Very few VCSE organisations have policies on AI – concerns about this.

Trustee engagement – good level of interest reported.

General feeling is that it's not yet making an impact on the quality or quantity of applications.

Most see it as an augmenting tool rather than a decision-making tool.

AI should be for the routine stuff – to present the human with the correct information.

Targeting the data and bringing it in house so that the AI isn't trawling the internet for it should improve accuracy.

One member has used AI integrated into Salesforce as part of a claims process when managing grants – the technology checks it (whether everything required has been provided and whether it matches what they'd said).

More and more demand for financial evidence and reporting – AI should be able to help save time with this. It enables more capacity without replacing the human element – it's a time-saving device to allow us to focus on the important stuff.

What do we do as grants managers when all the applications look really well written? How to adapt questions to bring in grass roots knowledge and avoid generic statements, drawing out knowledge that couldn't have been written by an AI.

We should be clear in policies how AI is to be used and be clear how we are analysing grant applications and phrasing the questions we ask.

A funder reported using it to undertake due diligence – integrated into SF to check Charity Commission / Companies House – found it useful.

Have also seen it from the application side (helping applicants to write better answers). It prompts the applicant to include additional things – have you thought about X?

Some funders use it for reporting, to produce reports to funders and donors to attract funding.

The prompt is an art to teach yourself – what you ask it to do and how is critical to the end result.

Threats

'[National Lottery Community Fund – AI principles](#)' shared by Rob Billson – useful as the basis of a policy document.

Another example = [Charity Excellence](#) – talks about risks. Also has a useful risk assessment template.

Breakout groups considering 3 questions – summary of feedback comments from the five different groups

What risks do you foresee in using AI within funding organisations?

How can we ensure AI benefits everyone, especially those most in need?

How do we ensure that we keep and enhance the human creative element in the use of AI?

We should make it clear that we want applicants to be open about using AI if they have done.

We should make people aware what our organisations think of AI and offer support to people who may not use it or want to.

The best funders don't just give funding but build in an element of support - we can bring AI to organisations alongside funding we provide. It can equip that organisation to better demonstrate the value of their work and bring in additional funding in the future.

Work very closely with regional and national funders – raise awareness with grass roots organisations. Make it bite-sized within other training so as not to make it intimidating so that people can just dip their toe in.

It's important to be creative with how we use AI – how we all utilise tools is different – those who are receptive and interested will see the greatest benefit. We need to support people who have concerns and are reluctant to use so that they don't fall behind, or deprived communities where using it is a big step for them.

A big risk is accountability and data sources from the AI. Some of these data sources are based in the US so what relevance does this have to Yorkshire and how reliable is it? What we get from AI needs to be sense checked.

Human element – keep use of telephone and human contact with groups as a part of their application process.

Both Microsoft and Amazon webservices are working hard to reduce the energy consumption their products use but AIs use a lot of energy at present.

AI learns fairly opaquely which is a concern.

Could use at all stages of the process but need a planned approach to decide where to start first and manage risk.

Early adoption might not mean you are best in class.

Funders will need a policy quickly given the pace of development – their criteria need to be clear – not just what an acceptable bid looks like but also how it can be made.

Members were concerned about an increase to the number of applications being received if they are easier and quicker to create.

Do we need a policy or are principles enough?

We are all different in the funding world and don't need to use it the same way.

One member reported issues with copyright within the arts field. Creatives in the UK are horrified that everything will be handed over to AI policies unless they opt out. Watch this space – creatives are extremely concerned.

Generic answers/plagiarism is also a worry – blackboard is a plagiarism checker used in universities – will there be a similar system?