

AI Leadership Readiness for Charity Leaders

Practical guidance on tools, governance, and getting started safely grounded in sector data

TODAY'S AGENDA

- 1 Scene-Setting**
Who's in the room, what we're covering, and why it matters now

- 2 Working with AI Assistants**
What AI actually is, the tools worth knowing, and the RACE prompting framework

- 3 Real World Application**
Administration, grant fundraising, data pipelines, and communications use cases

- 4 Safely Moving Beyond AI Assistants**
The AI Pyramid, Five Safety Boundaries, governance, and the Triple T challenges

- 5 Next Steps**
The REACH™ framework, key takeaways, and next steps



Welcome & Introduction

SCENE SETTING

YOUR PRESENTER

I'm **Mal Minhas**, a technology and AI advisor working with charities and purpose-driven organisations through **Diorama Consulting**. My background is as a CTO/CPTO in tech-first businesses. Over the last year I've focused on translating AI strategy, governance, and **operating model** thinking into practical frameworks organisations can apply immediately.

Today's session is designed for charity leaders at any level of AI familiarity. Whether you've never touched an AI tool or use one occasionally, you'll leave with something concrete to implement.

TODAY'S GOAL

Help you understand AI clearly, use it safely, and take one practical action back to your organisation by the end of the day.

CONNECT

dioramaconsulting.co.uk · [malminhas](https://malminhas.com)

THREE SLIDO POLLS SCAN TO JOIN

→ Poll 1 How often do you use AI?

Daily · Weekly · Infrequently · Never

→ Poll 2 Which of these AI assistants have you used?

ChatGPT · Copilot · Claude · Gemini · Perplexity

→ Poll 3 Where do you see AI assistance being most useful?

Grant Application · Project Management and Admin · Data Analysis · Research · Other

DISCUSSION (NOT SLIDO) WE'LL RETURN TO THESE

Does your charity have an AI policy yet? And what is your single biggest concern about AI? Keep those in mind both are addressed directly in Section 4.

Scan to answer in Slido or visit [slido.com #3485150](https://slido.com/#3485150)



TAKEAWAY *No wrong answers this helps calibrate depth and pace for the room.*

WHAT WE'RE LOOKING AT

No wrong answers your responses help calibrate the depth and pace of today's session.

How often do you use AI?

- Shows the spread of familiarity in the room helps calibrate examples so the session works for everyone.

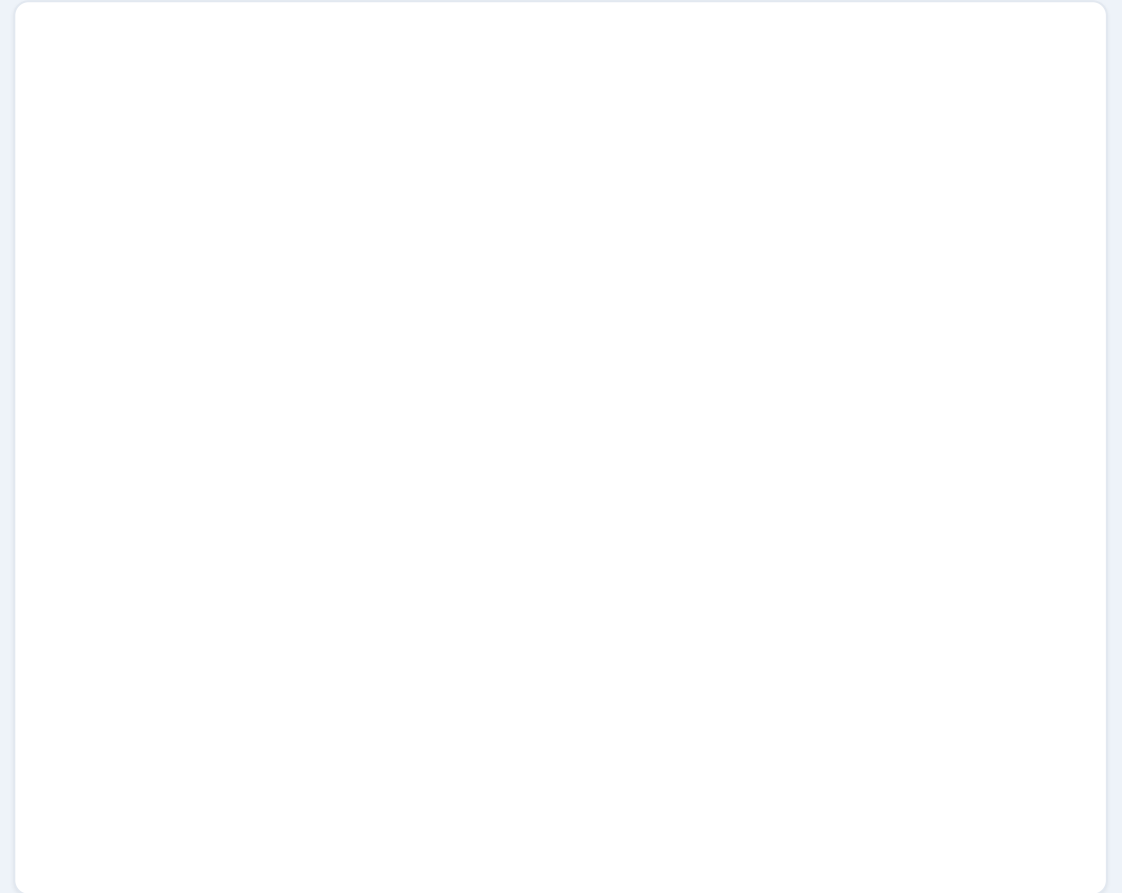
Which of these AI tools have you used?

- Tells us which tools are already in use and whether the tooling conversation should focus on getting started or going deeper.

Where do you see AI assistance being most useful?

- Shows where the room sees the biggest opportunity grant applications, project management and admin, data analysis, research, or something else entirely.

SLIDO #3485150



If the wall stays blank, your browser may block embedding — open the same Slido link in a window or share your screen instead.

TAKEAWAY *We start from real answers in the room so the next section lands at the right depth for everyone here.*

The Sector Right Now What the Data Tells Us

SCENE SETTING

THE ADOPTION PARADOX

The [Charity Digital Skills Report 2025](#) surveyed 672 UK charities. The headline: AI adoption is surging but confidence, skills, and governance are not keeping pace:

76%

Using AI (↑ from 61%)

64%

Staff struggling or not using AI daily

36%

CEOs with poor AI skills

44%

Boards with poor AI skills

KEY QUOTE

"76% of charities are using AI. This comprises 2% who are using it at a strategic level, 23% who are actively using AI and 51% who are exploring, piloting and testing AI tools."

SOURCE

[Charity Digital Skills Report 2025 \(PDF\)](#)

WHAT THIS SESSION ADDRESSES

THE GAP

Adoption is up. Confidence is not. The sector has moved fast but without the governance, skills, or strategy to match.

The three things most needed all covered today:

69% Want guidance on responsible AI adoption
→ [Section 4](#)

64% Want more free resources bespoke to the sector
→ [Takeaways & tools](#)

60% Want training for leaders and trustees
→ [REACH framework](#)

IF YOU ARE IN THIS SESSION

You are in the 63% who made digital progress this year. You have just closed the gap further by showing up today.

TAKEAWAY 76% adoption with 64% struggling = the paradox this session resolves. You are not behind you are the majority.

The Global Picture We Are All Still Early

SCENE SETTING

A GLOBAL PERSPECTIVE: WE ARE INCREDIBLY EARLY

If you feel behind on AI, look at the data. We are **incredibly early** in this journey:

84%

Never used AI

16%

Free chatbot users

0.3%

Pay for AI

0.04%

Use coding AI

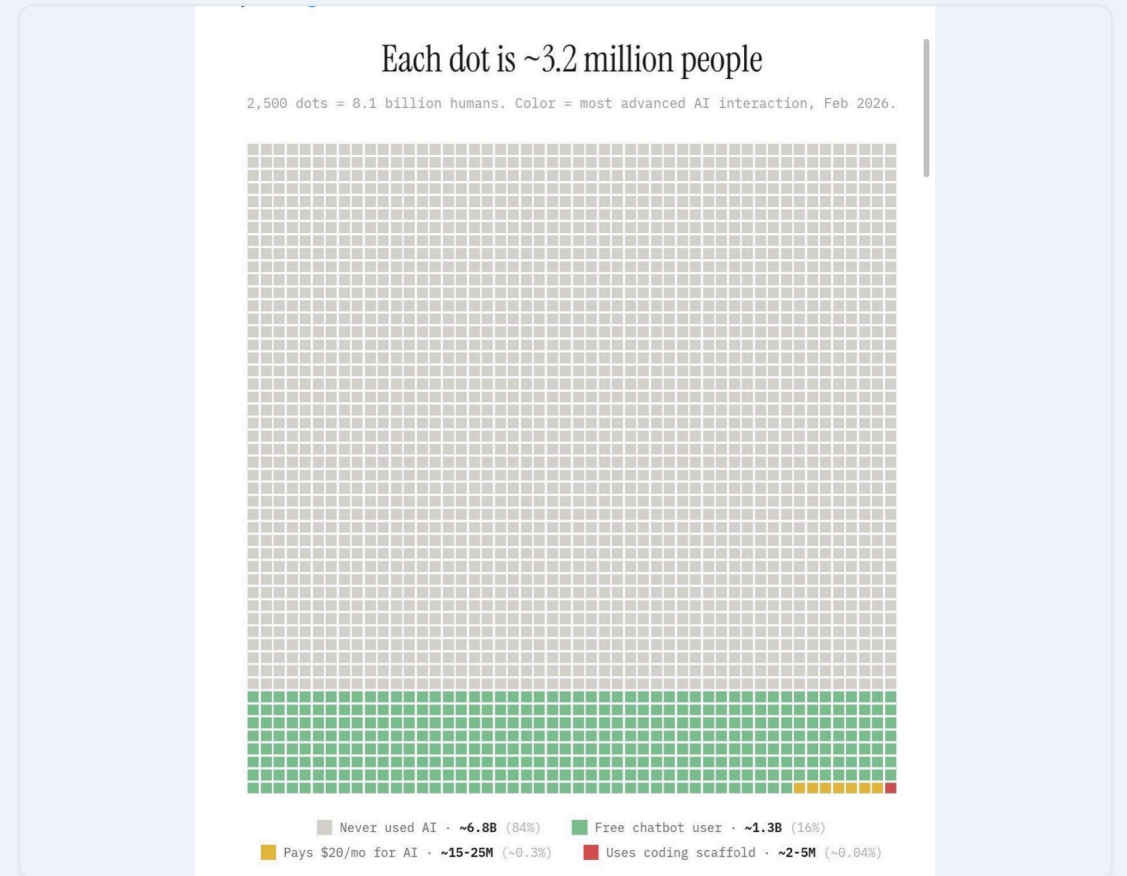
UK government research: only 1 in 6 businesses have adopted at least one AI technology, and most of those are large enterprises.

FURTHER READING

[Ben Tann: "The best reality check I've seen" AI adoption visualised](#)

[UK Gov: AI Adoption Research 16% of UK businesses have adopted AI](#)

GLOBAL AI ADOPTION FEB 2026



TAKEAWAY We are incredibly early. 84% of the world has never used AI. Being here today puts you in the top fraction of a percent.

Working with AI Assistants

What AI actually is, the tools worth knowing, honest limitations, the RACE prompting framework, and the AI Pyramid

What AI actually does

The key AI assistants

What AI can and cannot do

The RACE prompting framework

The AI Pyramid

WHAT YOU'RE ACTUALLY WORKING WITH

A language AI has learned patterns from **vast amounts of text**. It is extremely good at language tasks: drafting, summarising, translating, explaining, and structured thinking.

THE CRITICAL THING TO UNDERSTAND

It has no understanding of your mission, no memory between sessions, and no values of its own. When it confidently writes something wrong that is called **hallucination** and it happens by design, not by error.

WHAT MAKES IT USEFUL: THE CONTEXT WINDOW

The context window is the AI's working memory. Paste your entire annual report and it will read all of it. Modern tools handle 150,000+ words. The more relevant context you give it, the better the output.

BOTTOM LINE

You are not working with intelligence. You are working with an extremely capable **pattern-matcher** that is very good at language. That distinction shapes every safe use.

THE FOUR THINGS THAT MATTER

- 1 Pattern-matcher**
Trained on vast text. Predicts the most useful next response. Not searching a database, generating from learned patterns.
- 2 Language expert**
Drafting, summarising, structuring, translating, explaining. These are its strongest capabilities, use them.
- 3 No memory**
Each session starts fresh unless you re-provide context. It knows nothing about your charity unless you tell it.
- 4 Confidently wrong**
Hallucination is a feature of how it works, not a bug. It will state made-up facts with complete confidence. Always verify.

TAKEAWAY *AI is a pattern-matcher that is excellent at language and confidently wrong about facts. That distinction shapes every safe use.*

THE KEY AI ASSISTANTS

ChatGPT (OpenAI)

MOST WIDELY KNOWN

Free tier very widely used. Strong for general tasks. The tool most of your staff have already tried.

Best for: General drafting, Q&A, exploring ideas

Microsoft Copilot

MOST RELEVANT FOR YOU

Built into Teams, Outlook, and Word. Your data stays within your Microsoft 365 tenant. No new login needed.

Best for: Meeting notes, email drafts, document summaries in SharePoint

Claude (Anthropic)

BEST FOR CAREFUL WRITING

Free at claude.ai. Careful, thorough, excellent for nuanced documents, long-form writing, and charity governance content.

Best for: Grant narratives, board papers, impact reports, policy drafts

Perplexity

BEST FOR RESEARCH

AI-powered search engine that cites sources. Excellent for research with references answers questions with linked citations.

Best for: Research, fact-finding, literature reviews, sourcing evidence

WHERE TO START

IF YOU ARE ON MICROSOFT 365

Copilot may already be available in your Teams account. Ask your IT admin. It is the lowest-friction starting point because your data governance is already handled.

2026 UPDATE: MICROSOFT COPILOT TIERING CHANGES

From April 2026, Microsoft split Copilot into Basic (free) and Premium (paid) tiers. Basic users lose organisational data grounding and advanced features. Nonprofit discounts still apply but the paid tier is where the real capability sits. Review your M365 licence position.

[Computerworld: Microsoft Copilot tiering changes explained](#)

GOOGLE GEMINI

If your charity uses Google Workspace, Gemini is the equivalent built into Docs, Gmail, and Drive. Similar tiering and data protection considerations apply.

BOTTOM LINE

Start with the tool already in your ecosystem. Don't introduce a new account before you have a basic AI policy in place.

TAKEAWAY *If on M365 → start with Copilot. For writing and thinking tasks → Claude. For research → Perplexity. Both are free to try today.*

THE PRACTICAL PICTURE

THEY GENERATE THEY DO NOT KNOW

AI Assistants produce the most plausible-sounding response, not the correct one. They can be fluently wrong and have no way of knowing it.

- ✓ A tool for generating first drafts, summaries, and structured content
- ✓ A **thinking partner** for exploring ideas and options
- ✓ An assistant that improves the more context you give it

THEY ARE NOT A FINAL ANSWER

Every AI output is a first draft, not a final answer. The human is always accountable.

- ✗ A search engine (they don't browse the web by default)
- ✗ An oracle (they can be confidently wrong)
- ✗ A decision-maker (the human is always accountable)
- ✗ Something reading your private files (unless you share them)
- ✗ Neutral bias is baked into training data; AI output is not objective

THE HONEST LIMITATIONS

- ✗ **Hallucination:** produces plausible but wrong information by design, not by error
- ✗ **Recent events:** training data has a cutoff doesn't know last month's news
- ✗ **Your organisation:** knows nothing about your charity unless you tell it
- ✗ **Legal & financial:** cannot give binding advice always involve a professional
- ✗ **Emotional nuance:** can draft empathetic content but cannot replace human relationships

HALLUCINATION IN PRACTICE

"The National Lottery Community Fund's Reaching Communities programme closes 15 June 2025."

The date is completely fabricated NLCF deadlines are rolling and programme-specific. A fundraiser who planned their submission around this date would miss the real deadline entirely.

BUILD YOUR GROUND TRUTH

Always ask the AI Assistant for references then verify them yourself. Each checked source becomes part of your personal ground truth: a body of evidence you trust because you have traced it.

FURTHER READING: AI ELECTRICITY USAGE

Concerned about the environmental cost of AI? Hannah Ritchie's 2025 analysis puts AI electricity use in context against other sectors. [Hannah Ritchie: AI and Electricity \(2025\)](#)

TAKEAWAY *AI is a capable drafter of structure and language never a source of facts. Verify everything before it leaves your organisation.*

Prompting Best Practices The RACE Framework

STRUCTURING EFFECTIVE PROMPTS

The **RACE framework** gives you a repeatable structure for writing prompts that consistently get better results:

- **Role:** Tell the AI Assistant who to be, e.g. a grant writer, a fundraising strategist, a policy advisor. This shapes tone, depth, and perspective.
- **Action:** Be specific about what you want done: review, write, compare, explain, summarise.
- **Context:** Provide background. What's the project? Who's the audience? What constraints exist?
- **Expectation:** Define the output format: bullet points, table, 500 words max, plain English.

META-PROMPTING

You can ask the AI Assistant to help you write better prompts: "Help me write a RACE-structured prompt for [task]". This is called **meta-prompting** and it's surprisingly effective.

THE RACE FRAMEWORK

R

Role

Who should the AI be?

"You are an experienced charity grant writer"

A

Action

What should it do?

"Write a 350-word impact narrative"

C

Context

What background info?

"We support 140 young people into employment per year"

E

Expectation

What format/quality?

"Warm tone, outcome-focused, under 400 words"

TAKEAWAY RACE (Role, Action, Context, Expectation) transforms vague requests into precise instructions specificity is your biggest lever.

✗ WITHOUT RACE

THE PROMPT

"Write a grant application for our youth programme."

WHAT'S WRONG?

- ✗ No role provided so the AI Assistant doesn't know what expertise to draw on.
- ✗ Vague action which is unclear on what kind of application or funder.
- ✗ Zero context what charity? What beneficiaries? What outcomes?
- ✗ No expectations how long? What tone? What format?

RESULT

Generic, bland, misses your charity's specific impact, requires complete rewrite.

✓ WITH RACE

THE PROMPT

[R] You are a specialist charity grant writer for youth employability programmes.

[A] Write a 350-word funding narrative

[C] We are Street Futures in Glasgow. We support 16–24 year olds not in education, employment or training. Last year we supported 140 young people; 73% moved into employment or training within 6 months.

[E] Use this tone: warm, evidence-based, and specific about outcomes rather than activities.

WHY IT WORKS

- ✓ Role grounds the AI Assistant in grant-writing expertise
- ✓ Action is specific 350 words, funding narrative
- ✓ Context gives real beneficiary data to work from
- ✓ Expectation sets tone and outcome focus

RESULT

A fundable first draft that captures your specific impact. Edit takes 10 mins not 90.

TAKEAWAY *The same question with RACE structure produces dramatically better output structure beats cleverness every time.*

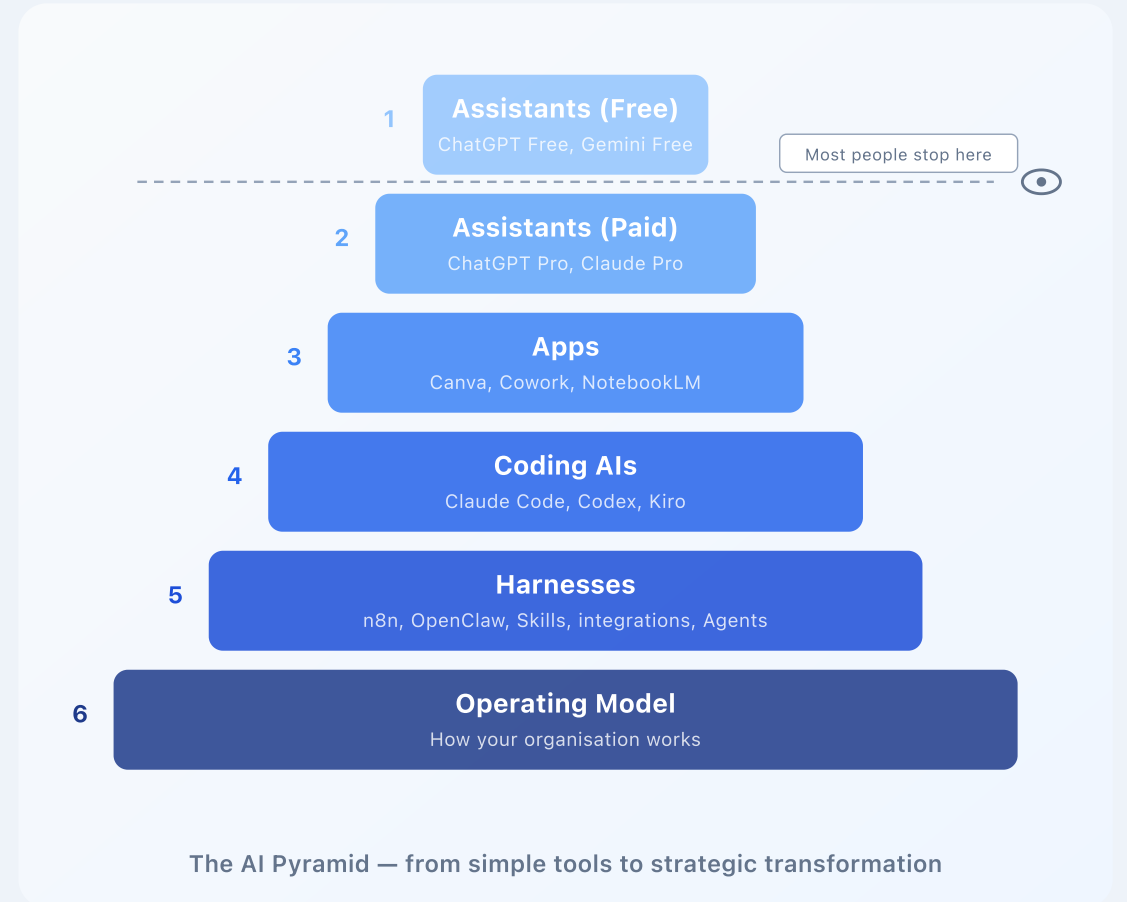
The AI Landscape Six Layers from AI Assistant to Transformation

SIX LAYERS OF AI ADOPTION

The AI Pyramid helps you understand **where you are** on the AI adoption journey and **where you're going**:

- 1 Assistants (Free)**
Entry point ChatGPT Free, Google Gemini, Microsoft Copilot Free
- 2 Assistants (Paid)**
Better models, longer context ChatGPT Pro, Claude Pro, Perplexity Pro
- 3 Apps**
The products you use to talk to models Claude Cowork, NotebookLM
- 4 Coding AIs**
Building software with AI Claude Code, Codex, Kiro
- 5 Harnesses**
Connecting models to your tools via integrations: n8n, OpenClaw, workflows, skills and agents that can act autonomously on your behalf.
- 6 Operating Model**
Rethinking how your organisation works with AI at the core

THE PYRAMID



TAKEAWAY Most people are at Layers 1–2. The real value starts at Layer 3 and above structured use of AI as a genuine productivity multiplier.

Real World Application

Charity-specific use cases grant writing, data reporting, and CRM
with practical frameworks

Grant writing

Data & impact reporting

CRAFT data pipeline

CRM & beneficiary systems

Use Case 1: Administration & Project Management

THE SECTOR'S #1 AI USE CASE

CDSR 2025: **48% of charities** use AI for administration and project management, up from 32% last year (+50% growth). This is the most common organisational use of AI in the sector.

✔ WHAT WORKS WELL

Board paper drafting, meeting minutes and action summaries, project status reports, policy document first drafts, staff induction materials, and internal communications. AI handles the structure; you supply the substance.

- ✔ Low-stakes first drafts
- ✔ Internal documents
- ✔ Time saved: 60-90 mins

⚠ WATCH OUT FOR

Pasting confidential board discussions or HR matters into free AI tools. Using AI-generated project timelines without checking dependencies. Sending AI-drafted external communications without human review.

- ⚠ Data boundaries
- ⚠ Verify before sending
- ⚠ Human review always

RACE IN ACTION: BOARD PAPER

EXAMPLE RACE PROMPT

[R] You are a charity governance specialist.

[A] Draft a board paper summarising our Q1 programme outcomes.

[C] We run three youth employability programmes across Glasgow. 140 beneficiaries this quarter, 73% completion rate.

[E] 500 words, formal tone, with a recommendations section.

WHY ADMIN IS THE BEST STARTING POINT

Internal documents are low-stakes. If the AI gets something wrong, you catch it before it leaves the building. This makes admin the ideal first use case for building team confidence.

THE COMPOUND EFFECT

Every board paper, meeting summary, and project report you draft with AI builds your team's prompting skills. The capability transfers directly to higher-stakes tasks like grant applications and funder reports.

TAKEAWAY Administration is the #1 AI use case in the sector and the safest place to start. Low-stakes internal documents build the skills that transfer to everything else.

THE SECTOR'S #2 AI USE CASE AND THE EQUALISER

CDSR 2025: **36% of charities** use AI for grant fundraising, rising to 43% of small charities vs only 27% of large. AI is levelling the playing field.

✓ GOOD USE

Housing charity uses RACE to draft a National Lottery Community Fund application. Provides context, beneficiary stats, audience, and tone. AI drafts the narrative. Officer verifies every statistic against source documents. Time saved: 90 minutes.

- ✓ Human accountable
- ✓ Context provided
- ✓ Output verified

✗ RISKY USE

Youth services charity asks an AI assistant for current grant opportunities, copies the list into a funding application. AI fabricated two grant programmes. Application submitted with false references credibility damaged.

- ✗ No verification
- ✗ AI as fact source
- ✗ Fabricated references

THE PATTERN

THE RULE THAT EXPLAINS BOTH CASES

Risk comes from trusting AI for facts. Safe use = AI for structure and language, human for facts. AI drafts the shape; you supply and verify the substance.

RACE MAKES THE DIFFERENCE

The good example works because RACE was used: Role (grant writer), Action (draft narrative), Context (real beneficiary data), Expectation (tone and format). The AI drafted, the human verified.

GREEN ZONE FOR GRANT WRITING

- ✓ Drafting from your own evidence: Green zone.
 - ✗ Asking AI to find or invent grant programmes: Red zone.
- The line is always: does this output require fact-checking before it leaves your organisation?

NO PAID TIER? FREE CHARITY-SPECIFIC TOOL

Charity Excellence offers a free AI bid writing tool built for the sector. A useful starting point if you don't yet have access to a paid assistant.

charityexcellence.co.uk Free AI Bid Writing

TAKEAWAY Grant fundraising with AI: use RACE to draft from your own evidence, verify every fact. AI is for structure and language never for sourcing facts.

COLLECT → REFINE → ANALYSE → FACT-CHECK → TRANSFORM

CRAFT is a five-step pipeline for any data task using **your AI assistant**. Each step is a plain-English instruction. **45% of charities** say they need support with AI tools for data, yet only 13% are currently using AI for numerical analysis. CRAFT closes that gap.

C Collect CSV, Excel, APIs, PDFs
Gather raw data from files, folders, or connected services. Tell your AI assistant what to load and from where.

R Refine Dedupe, types, missing vals
Deduplicate, fix types, handle missing values, normalise formats. Your AI assistant does this automatically or on instruction.

A Analyse Stats, trends, anomalies
Extract insights: calculate statistics, identify trends, find anomalies, run comparisons.

F Fact-check Verify, cross-check, source
Verify every statistic, reference, and claim against primary sources before the output leaves your organisation.

T Transform Charts, reports, dashboards
Present results as charts, summary tables, reports, or dashboards. Your AI assistant generates the visuals.

THE PIPELINE AT A GLANCE



EXAMPLE: BENEFICIARY IMPACT REPORT

"Load all beneficiary CSV files → remove duplicates → calculate completion rates by quarter → verify totals against source data → create a bar chart for the funder report"

KEY INSIGHT

You can describe an entire CRAFT pipeline in a single prompt to your AI assistant, or break it into steps for more control. Either way, your AI assistant plans and executes.

BUILDING GROUND TRUTH

Every verified CRAFT output becomes part of your organisation's **ground truth**, a growing body of checked data and insights you can confidently reference in future reports, grant applications, and board papers.

TAKEAWAY CRAFT (Collect, Refine, Analyse, Fact-check, Transform) gives you a repeatable structure for any data task. Describe the pipeline in plain English to your AI assistant.

THE SYSTEMS GAP IN THE SECTOR

From CDSR 2025: **34% of charities** use AI for communications and fundraising, almost doubled from 19% last year, rising to 38% of small charities. Yet 30% say their systems and databases, including CRMs, are poor or non-existent.

THE RECURRING PATTERN

Commercial CRMs (Salesforce, HubSpot) can be expensive to install and maintain for small charities. Many run on spreadsheets by necessity.

WHAT AI MAKES NEWLY POSSIBLE

AI can help build lightweight CRM functionality within tools you already own: Sheets, Airtable, or M365. Donor comms, beneficiary logging, and follow-up sequences at low cost.

ASK YOUR AI ASSISTANT TO DESIGN YOUR CRM STRUCTURE

Describe what you need and your AI assistant will propose a working schema in minutes: fields, categories, and logic for your donor or beneficiary database.

PRACTICAL STARTING POINTS TODAY

If you have a spreadsheet-based CRM right now:

- 1 Use CRAFT to run regular analysis on your contact/donor data: segment by engagement level, flag lapsed donors, identify top supporters
- 2 Use your AI assistant with RACE to draft personalised donor acknowledgement emails from a structured template and contact data
- 3 Use AI to generate a synthetic version of your donor database for testing new processes without GDPR risk
- 4 Ask your AI assistant to design a simple CRM schema in Google Sheets or Airtable: it will produce a working structure in minutes

THE BOTTOM LINE

30% of charities have poor or non-existent systems. AI makes lightweight, mission-specific CRM functionality achievable at low cost, starting today, with tools you already have.

WORKING WITH LOCAL FILES

If you have an enterprise licence, [Claude Cowork](#) is a great starting point for working directly with local files: donor spreadsheets, contact lists, and impact reports. It connects your AI assistant to your actual data without copying it into a chat window.

TAKEAWAY 30% of charities have poor or non-existent systems. AI makes lightweight, mission-specific CRM functionality achievable at low cost, starting today.

Governance & Safe AI Practice

Five Safety Boundaries, responsible governance, AI policy essentials,
and the three challenges every charity needs to design around

Five Safety Boundaries (GUARD)

Responsible AI & Governance

AI Policy essentials

Trust, Training & Tooling

The Five Safety Boundaries

GROUND → UNDERWRITE → ALIGN → RESIST → DEFEND

GUARD maps the five boundaries every charity must apply before scaling AI use. They apply to **every staff member** using any AI tool.

G Ground
Verify all facts, stats, and references before use.
Two-click test: every claim must trace to a primary source in two clicks.

U Underwrite
Human review for any AI output reaching vulnerable people.
Sign-off test: is there a named human accountable for the AI output?

A Align
Align AI use with your charity's mission and values.
Trustee test: would you be comfortable explaining this to your board?

R Resist
Preserve human skill and professional judgement.
AI-offline test: could your team do this if AI were unavailable tomorrow?

D Defend
No personal or beneficiary data in free AI tools.
Newspaper test: would you be comfortable if a journalist saw this prompt?

TECHNIQUE: ANONYMISATION IN PRACTICE

A KEY TECHNIQUE UNDER D DEFEND (DATA PROTECTION)

Anonymisation: replacing identifiers before you paste, removes the GDPR barrier for most analytical and drafting tasks. It is not a standalone boundary, but the primary technique for applying Defend safely in practice.

BEFORE: CONTAINS PERSONAL DATA

"Jane Smith, 34, referred by GP on 3 March. Three missed appointments. Currently housed at 14 Elm St, Glasgow."

AFTER: SAFE TO USE WITH AI

"Client A, mid-30s, GP referral, March intake. Three missed appointments. Currently housed, Glasgow."

DATA CLASSIFICATION: GREEN/AMBER/RED

Green: public info, internal drafts, synthetic data.

Amber: aggregated stats without names, check your policy.

Red: names, case notes, addresses, financial data, never in a free tool.

43% OF CHARITIES CITE DATA PRIVACY AS A TOP AI BARRIER

Anonymisation and clear data classification dissolve most of this barrier.

TAKEAWAY **GUARD** Ground, Underwrite, Align, Resist, Defend. Five boundaries that keep your AI use safe, ethical, and legally sound.

WHY GOVERNANCE COMES BEFORE SCALE

The **Triple T challenges (Trust, Training, Tooling)** are the ones every charity must design around before scaling AI use:

T1 TRUST

Trust is not an attitude problem. It is a design problem.

60% of charities worry about AI implications. Build verification into every workflow, not as an afterthought. The verification tax is real: 77% of leaders manually verify AI outputs.

[Unlikely AI Trust Report 2026](#)

T2 TRAINING

Daily practice beats workshops.

64% of those charities using AI tools struggle with them. The most effective lever is the CEO and senior leaders using AI personally before embedding it in teams. If leadership is in the 36% with poor skills, that is the first priority.

[Free AI Fluency for Nonprofits training](#)

T3 TOOLING

The tier matters more than the tool.

Free consumer tools are not appropriate for beneficiary data. If you have 5+ staff, consider a paid enterprise grade plan such as Claude for Nonprofits. The tier determines your data governance, not the brand name.

[Claude for Nonprofits](#)

GOVERNANCE IS PROTECTION, NOT PAPERWORK

THE MOST COMMON MISTAKE

Starting AI adoption with tools, not governance. Staff experiment freely, data boundaries get crossed, and the first incident sets the whole programme back.

FUNDERS ARE ASKING

Funders are starting to ask about AI governance in due diligence. Having a policy signals responsible stewardship.

CDSR 2025: GOVERNANCE GAP (P.14)

Only 2 in 10 charities are reviewing governance for trustee oversight. Only 23% are updating risk registers.

START THIS MONTH

Start with a one-page AI policy this month. It is the single most impactful governance action you can take.

TAKEAWAY *Governance before tools. Trust, Training, and Tooling are the three challenges to design around. A one-page AI policy is the first step.*

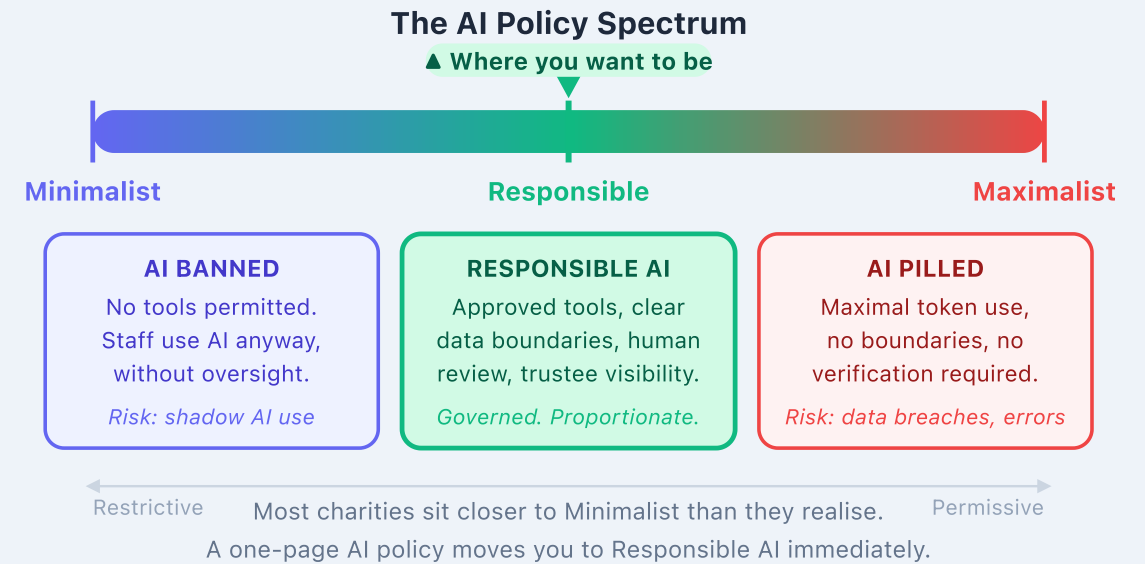
THE MINIMUM VIABLE AI POLICY

- 1 Approved tools and tiers**
Which AI tools staff can use, at which tier, for which tasks. Free tier for personal exploration only; organisational tier for work output.
- 2 Data boundaries**
What data can go into AI tools (green/amber/red classification). Never: beneficiary names, case notes, personal data in free tools.
- 3 Verification requirements**
Who checks AI output before it leaves the organisation. Every AI-assisted workflow needs a human review step.
- 4 Trustee visibility**
AI on the board agenda at least quarterly. Trustees have governance responsibility and need visibility.

ALSO CONSIDER

- **Training expectations:** what AI literacy looks like at each level
- **Incident response:** what happens when AI output causes a problem
- **Review cycle:** policy reviewed at least annually as tools evolve
- **Ethical alignment:** AI use must align with your charity's mission and values

THE AI POLICY SPECTRUM



START IMPERFECT

The policy doesn't need to be perfect. It needs to exist. Iterate as you learn.

TAKEAWAY Four essentials: approved tools, data boundaries, verification requirements, trustee visibility. Start with one page.

Next Steps

Your personal AI leadership journey and concrete next steps

REACH™ framework

Quick wins

Key takeaways

Resources & next steps

RECOGNITION → ENGAGEMENT → ACUMEN → COMPETENCY → HABIT

REACH™ maps the personal journey from first awareness of AI to fluent, habitual use. It is sequential: you cannot sustainably skip stages.

R Recognition
You understand that AI is relevant to your role and sector. You can articulate why it matters.

E Engagement
You are actively experimenting. You have tried tools, written prompts, and noticed what works.

A Acumen
You understand the landscape: tools, tiers, risks, governance. You can make informed decisions.

C Competency
You can apply AI to real work tasks with consistent quality. Cannot be self-assessed, requires doing.

H Habit
AI is part of your daily workflow. You use it without conscious effort. It has changed how you work.

WHERE ARE YOU RIGHT NOW?

CDSR 2025 CONTEXT

37% of charities have taken no action, pre-Recognition. Most people in this room are at Recognition or early Engagement. That is exactly right for May 2026.

INTERESTED IN THE REACH SELF-ASSESSMENT?

A free REACH self-assessment tool is in development. Register your interest using the feedback form at the end. More information at air.netlify.app.

IF YOU RUN OR SUPPORT OTHER CHARITIES

If you are an infrastructure body, umbrella organisation, or sector support agency, your REACH score has a multiplier effect. Every leader you help move from Recognition to Engagement ripples out to their whole organisation.

TARGET FOR 2026

Consistent daily use, a basic AI policy in place, and AI on the board agenda at least quarterly. Regular practice is what builds Competency and, eventually, Habit.

THE CONSTRAINT PRINCIPLE

Your lowest-scoring REACH dimension is your primary lever. Fix the bottleneck, don't optimise what is already working.

TAKEAWAY Most people in this room are at Recognition or early Engagement. That is exactly right. REACH™ gives you a clear map of what comes next.

WHAT TO REMEMBER

- 1 76% of charities use AI, but 64% of them report they struggle. You are not behind.
- 2 **RACE** (Role, Action, Context, Expectation) transforms every prompt you write.
- 3 **CRAFT** (Collect, Refine, Analyse, Fact-check, Transform) turns hours of data work into minutes.
- 4 **GUARD** (Ground, Underwrite, Align, Resist, Defend) safety boundaries protect your beneficiaries, your data, and your charity's reputation.
- 5 The **Triple T** (Trust, Training, Tooling) are the three challenges every charity must design around. Governance before tools, starting with a one-page AI policy.
- 6 **REACH**[™] (Recognition, Engagement, Acumen, Competency, Habit) maps your personal journey: fix the bottleneck, not what's already working.

QUICK WINS: DIY MINDSET

THIS DECK WAS BUILT WITH AI

This deck was built using a **Claude Skill**, an automated workflow that applies the RACE framework to generate structured content. The output was refined and modified with **Claude Code**. The charity-specific grounding and accuracy checks were done manually. You can build the same kind of skill for your own recurring outputs: board papers, grant applications, or impact reports.

TRY ONE THING THIS WEEK

Write a RACE prompt for something real. Run CRAFT on a safe dataset. Draft a one-page AI policy. Take the REACH self-assessment at air.netlify.app. Pick one, do it this week.

THE DIY MINDSET

The organisations that will thrive with AI are those that experiment, verify, and iterate, not those that wait for perfect tools or perfect training.

TAKEAWAY Six takeaways, one action this week. The DIY mindset is the competitive advantage.

GET IN TOUCH

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FEEDBACK

Your feedback shapes the next session. Please scan the QR code on the right to complete the short [feedback form](#).

SESSION 2: GOING DEEPER

A follow-up session is being planned on developing an organisational AI roadmap. Your feedback today will help shape it.

Thank you.

Now go and try one thing today!

NOW Q&A

HOW Q&A WORKS

Post questions in the Zoom chat or raise your hand.

RECORDING NOTE

Today's session has been recorded. The presentation and resources will be shared with all attendees.

SCAN TO GIVE FEEDBACK



[feedback form](#)

TAKEAWAY Thank you. One thing this week. Connect on LinkedIn. Complete the feedback form.