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How to Develop a Clear Vision for AI

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Leading organisations in all sectors are working towards establishing a clear vision for AI, ensuring that it is understood, and that any risks are mitigated and any impacts maximised.

Previously, Artificial intelligence has largely been a concept rather than a tangible force, with many businesses carefully exploring its possibilities. Now, we encounter a vastly altered environment where the adoption of AI, particularly generative AI, has surged across various sectors.

AI is transforming business models and strategies, but for companies to truly benefit from it, not merely test its capabilities, they require a well-defined AI strategy.

This disconnection underscores an essential reality: effectively integrating AI involves more than just adopting technology; it necessitates a thorough strategic framework that aligns technological skills with tangible business results and sustainable value generation.

Implementing AI goes beyond simply using technology; it involves transforming your organisation's business framework and aligning its culture, objectives, and resources.

Regardless of your optimisation goals, understand that incorporating AI requires a sustained approach, not an immediate solution. It needs a clear vision.

The Charity Sector And Its Relationship With AI

Over the past year, the transformative potential of Artificial Intelligence (AI) has emerged as a major theme for discussion and debate, including within the charity sector.

Whether your organisation is already using AI, are planning to do so or don't yet know how it might be useful, it is important that you are aware of the opportunities and risks involved. The key consideration is that AI should be used responsibly in a way that furthers your charity's purposes.

Artificial intelligence holds the promise of numerous advantages, especially by assisting charities in reducing the time spent on labor-intensive activities, thereby allowing more hours to focus on critical priorities.

Generative AI, which generates written and visual content based on human prompts, is rapidly growing. Various charities are utilising these writing tools for creating fundraising documents, proposals, speeches, and policy drafts, while speech-to-text applications effectively capture meeting notes.

Although opportunities exist, it's important to be careful because there are associated risks that must be taken into account and handled. These dangers are part of how AI is constructed, functions, and evolves. Since AI is still developing, it may not consistently perform accurately.

Charities must adhere to broader legal requirements, which encompass issues like copyright protection and the avoidance of harmful material. The implementation of AI in charity functions can heighten risks, particularly concerning data security and compliance with GDPR, along with other regulatory hurdles. As AI technology is still developing in terms of safety and its potential, it is crucial to utilise it responsibly.

According to the 2025 Charity Digital Skills Report, 74% of charities now agree that AI developments are relevant to them, while 59% are worried about the implications of using AI. 62% are excited about the potential for these tools to increase their impact.

The Charity Digital Skills Report is an "annual barometer of digital and AI adoption, skills, attitudes, funding and support needs across the sector". They look at how charities' experiences with digital skills and AI are developing year by year, and what support the sector needs going forward.

59% are worried about the implications of using AI (e.g. for service quality, data privacy). This rises to 74% of large charities, who are further ahead with AI use, which suggests that the concerns about AI grow the further along a charity is with implementing it.

One-third of charities are unsure about how to begin using AI. This uncertainty is closely tied to overall digital skills, as 47% of people at the initial stages of digital transformation express a lack of knowledge on starting their journey with AI.

With the advancement of AI and the increasing number of applications, it may be advantageous to establish an internal AI policy. This would clarify the appropriate circumstances for its usage in governance, by employees in their tasks, and in providing services to beneficiaries.

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How Are Charities Currently Using AI?

According to the 2025 Charity Digital Skills Report, 76% of charities are using AI, compared to 61% who were using it in 2024. Interestingly, 91% of charities with a digital strategy in place, who feel they are at the advanced stages with digital, are using AI tools.

The 2025 Charity Digital Skills Report asked several questions about how charities are using AI. Their findings tell us some useful things about the different ways the sector is adopting artificial intelligence.

The top 5 ways charities are using AI day to day are:

_50% are using AI for documents and reports (e.g. drafting or structure content).

_48% are using AI for administrative tasks, up significantly from 32% last year.

_36% are using AI for developing online content.

_35% are using AI for idea generation.

_29% are using it for research and information gathering.

The top 3 ways charities are using AI at organisational level are:

_48% are using AI for administration and project management.

_36% are using AI for grant fundraising, this rises to 43% of small charities in comparison to 27% of large charities.

_34% are using AI for communications and fundraising.

The areas where most charities indicate a lack of expertise are:

Using AI tools in everyday work: 35% of charities say they are poor at this, while 29% say they don't do this. Only 4% feel they are excellent at using AI tools.

Keeping up to date with tech trends: Half of charities are finding this a challenge, 41% of charities are poor at this and 9% don't do this at all.

Investing in and resourcing digital effectively: Half of charities say that they are either poor at this (40%) or don't do this (10%).

Even with the rise in AI interaction, it's troubling that numerous charities are experiencing challenges in integrating these technologies into their operations and staying informed about the latest advancements in tech trends.

48% are developing an AI policy, a number that has tripled since 2024 when only 16% were doing so. For large charities this is at 68%, compared to 37% of small charities.

Many may persist in utilising AI exclusively for routine work activities, remaining in the exploration phase. They might overlook the need for a strategic approach, failing to consider the potential risks and advantages of integrating AI tools within their organisation effectively.

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Developing a Clear AI Vision

What is an AI Strategy?

An AI strategy serves as a comprehensive business framework detailing how an organisation plans to leverage AI technology to meet its objectives. This vision directly connects AI with business goals, including boosting efficiency, enhancing customer satisfaction, and fostering innovation.

An effective AI strategy is not standalone; it enhances and integrates with a company's overall digital transformation and data approach, converting raw data into actionable insights via automation and intelligence driven by AI.

To build a clear vision for AI, focus on these key elements:

1_Establish Clear Objectives

A strong AI strategy is built on developing a comprehensive understanding of AI's role in your charity. AI efforts must not be seen as isolated endeavors; instead, they should be seamlessly woven into your broader work culture.

This is why it's crucial to define clear objectives when it comes to artificial intelligence. Charities should identify key business objectives that AI can help achieve, such as:

_Improving customer satisfaction
_Increasing operational efficiency
_Improving workflows
_Automating day-to-day tasks
_Enhancing decision-making

Then, define specific AI goals that could align with these objectives. Develop a clear vision statement that summarizes the foundational elements, goals, priorities, and expected outcomes of AI initiatives. This statement must be comprehensible to every stakeholder. Communicate the vision consistently throughout the organization to ensure it is understood.

2_Data Readiness

Before embarking on any AI implementation, it's essential to assess your organisation's data readiness. If your charity's information and understanding of that data is not clear, accurate and easy to manage, you might not get the results you want.

Conducting a data audit—which evaluates your information quality, accessibility, and governance—is crucial because it:

_Identifies your organisation's data sources, including any databases, records, and financial reports.

_Reviews data's accuracy, consistency, and completeness so AI systems are using reliable information.

_Ensures relevant teams across your organisation can access the data in a more efficient and centralised way.

_Evaluates how you manage data, who can access it, and how secure it is from breaches or compliance violations.

3_Invest in Technology

The next step is selecting the AI technologies and tools that align with your goals, objectives and capabilities. Begin by evaluating the challenges you aim to address with AI, like streamlining workflows, elevating customer satisfaction, or refining decision-making processes.

AI technologies that can benefit your charity include:

_Machine-learning platforms
which enable systems to learn from data and improve without explicit programming.

_Natural language processing tools
which allow machines to understand and respond to human language.

_Robotic process automation
which automates repetitive, rule-based tasks and frees up time for more strategic work.

It is also crucial when evaluating which tools to use, to test the technology on a smaller scale before deciding to go with a full scale implementation.

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4_Develop an Ethical Governance and Risk Framework

As companies quickly adopt AI technologies, numerous organisations neglect crucial ethical factors like data privacy, bias, and transparency. It's essential to incorporate these elements into your strategy from the outset to prevent significant repercussions.

Ignoring these concerns can expose your organisation to potential legal issues, erode customer trust, and cause lasting harm to your reputation.

Since AI heavily relies on data, it's vital to have a strong data governance policy detailing how you collect, store, and use data to manage privacy, security, and integrity.

_Assign roles and accountability: Designate clear roles for leadership and teams to oversee, regulate, and update AI systems. This promotes transparency, accountability and thorough decision-making within your AI vision.

_Implement frequent risk assessments: Consistently assess AI systems for new risks, regulatory adherence, and ethical considerations.

_Prioritise transparency: Ensure that AI systems and their decision-making methods are understandable, particularly in critical situations.

_Integrate ethical guidelines: Incorporate ethical standards into your AI approach, focusing on equity, bias, and data privacy.

_Ensure good data governance: Implement rigorous data management practices and frequently assess data accuracy to ensure ethical and compliant AI usage.

5_Prioritise Training and AI Skills Development

AI can be complex, and without a skilled team, you might not achieve your desired outcomes.

You should identify skills gaps and ensure employees are up to date with your AI strategy, and trained in how to use AI according to that vision.

Teamwork is crucial. AI initiatives must not function alone; they need to align with organisational objectives across departments. By investing in AI training and ensuring you have the right skills, your charity can be better positioned to handle the challenges of AI.

Challenges of AI Adoption

There are several different kinds of barriers to charities' AI adoption progress found in the 2025 Charity Digital Skills Report.

Smaller charities are less likely to move forward with AI due to a lack of skills and training, as well as data privacy concerns. Their biggest challenges are:

_Limited digital skills and technical expertise (47%).

_Lack of training or support to upskill ourselves (45%).

_Data privacy, GDPR and security concerns (38%).

Large charities are less likely to move forward with AI due to data concerns, as well as concerns about the accuracy and bias built into AI tools. Their biggest challenges are:

_Data privacy, GDPR and security concerns (56%).

_The potential for bias and discrimination (46%).

_Issues with factual accuracy in AI-generated answers (42%).

Over half of nonprofit organizations aim to enhance their knowledge of artificial intelligence, examining its applications within their operations and services while seeking support to identify practical use cases.

The areas of AI that most charities answered they would like more external support for are:

_General understanding of AI and how charities are using this (58%).

_Practical uses of AI in everyday work (58%).

_Exploring potential use cases for AI in services (51%).

_Assessing AI risks (bias, safeguarding) and using AI tools responsibly (51%).

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Risks of AI for Charities

AI serves as a potent tool for enhancing oversight and decision-making, but also as a source of risk requiring careful management.

There are different kinds of risks all organisations face when incorporating AI into their processes, including ethical and reputational risks, cybersecurity threats, regulatory compliance risks, and data privacy concerns.

AI can bring several potential risks for charities:

_Data Privacy Breaches: Improper handling of data or unauthorized access could lead to leaks of confidential boardroom information.

_Cybersecurity Vulnerabilities: AI systems can be targeted by hackers exploiting vulnerabilities in software, hardware, or cloud services.

_Inadequate Data Governance: Poorly managed data flows between AI systems and external servers could result in unintentional sharing of confidential data.

_Lack of Explainability: If an AI system generates outputs without transparency, it may inadvertently reveal or misrepresent sensitive board discussions.

_Vendor Reliance and Third-Party Risks: Third-party AI vendors might not have robust security measures in place, leading to potential data leaks.

_Data Persistence and AI Training Risks: Some AI systems retain input data for training, creating a risk of unauthorised reuse.

This is why it's important to ensure your AI tools are secure and compliant, as no new innovative tools are more important than security. You should look for AI platforms and tools that you can trust with your data.

Charities should use secure, proprietary AI platforms tailored for confidential data, as well as ensure AI tools comply with laws like the EU AI Act, CCPA, or GDPR, in order to establish data security. They should also focus on tools that are endorsed by their IT and Security departments.

Public AI systems depend on various data sources, which considerably heightens the potential for security threats. In contrast, private AI is specifically designed to prioritise security and adhere to the most stringent regulations. This form of AI is trained on exclusive, confidential data and does not depend on outside sources or vendors. It is specifically created to cater to organizations that wish to maintain complete control over their data.

Charities need to make sure the tools they use do not compromise any of their data. Confidentiality and security is non-negotiable for the sector.

How Can Convene AI Help Your Charity

Our smart, secure board management software now integrates AI to streamline meeting documentation, boost governance efficiency, and protect your data. Powered by AWS Bedrock, Convene AI ensures a secure data environment and peace of mind.

With Convene, you can elevate AI capabilities to manage your board processes with ease, and ensure you make informed decisions.

Here are some of the key features of Convene AI that can help your charity:

AI Companion

_Drive Decisions with Intelligent Insights: Equip leaders with AI-generated summaries of meeting files, highlighting critical details. Plus, simply ask Convene AI for document insights to make strategic decisions with confidence.

_Get Tailored Support, Right in the App: Quickly resolve technical issues or navigate the app by asking Convene AI. For further support, connect with our team via call, email, or chat — Convene AI makes getting assistance effortless.

_Maximise Efficiency with Smart Assistance: Perform app actions with your smart virtual assistant, Convene AI. Effortlessly create tasks, send notifications, and access past decisions and records, all with a simple message.

Automated Minutes

_Summarise Meetings Instantly: Access key insights and decisions, as well as transcripts and recordings, in seconds! Unlike other solutions, you have full control, allowing you to edit AI-generated meeting summaries for greater accuracy.

_Auto-generate Meeting Action Items: Turn meeting summaries into action with automated suggestions, so you can kickstart progress right away. Easily refine and customize action items to suit your board's needs.

_Craft Executive-Ready Minutes: Your minutes are more than just notes — they're a professional record of your meetings. Refine grammar, tone, and flow with just a few clicks for clear, actionable documentation.

Maximize Performance, Minimize Risk. The Platform You Can Trust.

Your information is safeguarded by the best, 24/7. At Convene, security is always our top priority. We continuously enhance our platform to ensure you make an impact while your data is safeguarded, giving you the confidence to work worry-free!