



AI STARTER PACK

Free guidance and resources to help UK non-profits start or accelerate their AI adoption



For more information on our AI readiness services,
contact us via Allen.Reid@getsavi.co.uk

What this starter pack includes

AI
maturity
guidance



One-page, quick read guidance on the 5 key organisational areas of focus to reach AI maturity

Self-
assessment
checklists



5 easy-to-use checklists on your organisation's maturity in the key organisational areas of focus

Use cases:
10 AI quick
wins for
non-profits



Examples of 10 process areas where you can achieve quick wins in your AI adoption plans

Template: AI
governance
setup



A starter template for setting up AI governance as the foundation for readiness and adoption

The 30-day
AI
pilot plan



A stage-by-stage 30-day plan to pilot the use of AI in priority areas, learning as you go



AI maturity guidance

To become an organisation that uses AI in a mature way, you will need to take action in 5 key organisational areas.

Here is some headline guidance on what you need to do in each area.



GOVERNANCE

Your organisations should ground AI use in recognised external frameworks, supported by a clear, cross-functional governance group with defined decision rights. You should set practical rules for safe AI use and embed ongoing oversight through management and internal audit processes. Clear checklists should guide your external communications about AI to ensure accuracy, transparency, and compliance.



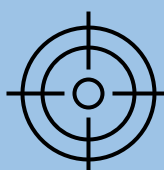
STRATEGY

Your organisation should align investment in AI to your purpose, mission and stakeholder value proposition, prioritising initiatives with measurable benefits and avoiding technology-led spending without clear outcomes. You should follow a phased investment roadmap, integrating AI into strategic and financial planning. All activity should treat AI as an ongoing, evolving investment rather than one-off development.



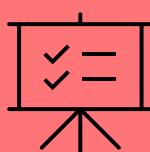
CHANGE

Your organisation should create a clear, inclusive change narrative that frames AI as a toolkit for empowerment, supported by transparent communication. Engagement should be sustained at all levels through visible leadership and local champions to build confidence and demonstrate real benefits. Resistance should be addressed with empathy and two-way dialogue, while change management analysis and action is used to support continuous learning.



PROCESS

Your organisation should start with high-impact AI use cases inside processes, supported by secure data principles and sound, AI-ready technology platforms. AI should be embedded directly into everyday workflows with feedback mechanisms to support adoption and responsible, explainable use. Regular development is essential to ensure ongoing value, compliance, and alignment with changing stakeholder needs.



TRAINING

Your organisation should assign overall responsibility for skills development to an HR, L&D, or Training lead, and begin by identifying early adopters to upskill first. You should gather broader training needs aligned to specific roles and divide learning between internal and external providers. You should also focus on core technologies and tools while encouraging experimentation to ensure confident use and adaptability.



GETSAVI TOP TIP: you can use this guidance for leadership conversations immediately ahead of assessing your organisation's current AI maturity levels

Self-assessment checklists

Use the self-assessment checklists with leaders from each of the 5 key organisational areas of focus, or as a group exercise within your leadership team.

Mark each sub-area based on your current level of maturity (1 to 5). You can then reassess each area at later review points after adoption action has been taken.

Area 1: Establishing AI governance controls and policy

	Initial check	1st review	2nd review
1 Leverage key external AI frameworks and principles	☐	☐	☐
2 Set up / repurpose org-wide governance group	☐	☐	☐
3 Establish oversight and guidelines on safe usage	☐	☐	☐
4 Activate oversight through audit team / management	☐	☐	☐
5 Create external comms on explainability of AI usage	☐	☐	☐

Scoring: 1 = absent, 2 = in discussion, 3 = plans in place, 4 = ongoing action, 5 = fully established

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Area 2: Securing investment for AI and business planning commitments

	Initial check	1st review	2nd review
1 Link AI adoption to existing org-wide strategies	☐	☐	☐
2 Create the business case for investment	☐	☐	☐
3 Align this on a roadmap to change / operational plans	☐	☐	☐
4 Assign overall AI progress owners at leadership level	☐	☐	☐
5 Add progress reporting on the leadership agenda	☐	☐	☐

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Area 3: Organising proactive AI change management activities

	Initial check	1st review	2nd review
1 Agree an AI vision statement and messages	☐	☐	☐
2 Organise engagement on AI adoption at all levels	☐	☐	☐
3 Invite feedback and engagement on barriers	☐	☐	☐
4 Offer safe ways to experiment in teams	☐	☐	☐
5 Add AI change impact assessments to all projects	☐	☐	☐

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Area 4: Gathering AI tech requirements and scoping supplier projects

	Initial check	1st review	2nd review
1 Start with priority “use cases” in your processes	☐	☐	☐
2 Prioritise key data quality improvements	☐	☐	☐
3 Engage current / new suppliers on opportunities	☐	☐	☐
4 Deliver and evaluate priority AI system features	☐	☐	☐
5 Continue in phases: scope, deliver, evaluate	☐	☐	☐

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Area 5: Mobilising AI training, upskilling and ownership in teams

	Initial check	1st review	2nd review
1 Assign skills development to a HR/L&D/Training lead	☐	☐	☐
2 Identify early adopters and upskill them first	☐	☐	☐
3 Gather wider training needs linked to roles	☐	☐	☐
4 Divide upskilling between internal / external providers	☐	☐	☐
5 Focus on core tools including ongoing learning	☐	☐	☐

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Use cases: 10 AI quick wins for non-profits

The following examples offer an opportunity for quick wins in your organisation's progress towards AI maturity.

Each use case – area for potential adoption of AI in your processes – should deliver automation or operational support for your team members.

You can use the 30-day AI pilot plan to explore these quick wins and gain momentum as an AI-ready organisation.



MEMBERSHIP / DONOR MANAGEMENT

1. Personalising member / donor communications
2. Automated segmenting of members / donors



EVENT MANAGEMENT

3. Generating event content for publication
4. AI analytics and tracking event information

Use cases: 10 AI quick wins for non-profits



MARKETING MANAGEMENT

- 5. Marketing campaign creation support using GenAI
- 6. AI-assisted campaign performance tracking



DATA & REPORTING

- 7. Automated data corrections, quality tasks
- 8. Using natural language queries to interrogate data



EDUCATION MANAGEMENT

- 9. Generating learner storyboards and content
- 10. Automating nudges to learners in course journeys



BE AWARE: in some areas, a plug-in tool may be quicker to adopt than a change in your core systems. Always check in on best practice with your organisation's data governance and IT leads.

Template: AI governance setup

A practical framework for safe and ethical AI deployment

Use this template as a foundation for any adoption activity you intend to start or progress using this starter pack. Even if its “light-touch”, you should have AI governance set up as a priority so you can sense-check all activity against external regulations and standards, as well as internal AI policy and IT procedures



Establish a clear governance framework for safe, responsible AI usage and compliance.

Key frameworks to consider:

- [ICO guidance on AI and data protection \(Mar 2023 update\)](#)
- [International Organisation for Standardization \(ISO\) and the International Electrotechnical Commission \(IEC\) standard: ISO/IEC 42001:2023 \(Dec 2023\)](#)
- [The Organisation for Economic Co-operation and Development \(OECD\) AI Principles \(May 2024 Update\)](#)
- [Implementing the UK's AI regulatory principles: initial guidance for regulators \(Feb 2024\)](#)

KEY PRINCIPLES FOR YOU TO CONSIDER

Accountability: Ensuring clear ownership for decision-making about your use of AI, including how to escalate issues, manage risks, and safeguard results.

Explainability: Understanding exactly how the AI models you are using operate so these can be regularly validated and trusted.

Transparency: Clarifying for external and internal stakeholders why and how you are using AI, e.g. planning member / donor communications on AI use.

Fairness: Embedding protective measures to minimise bias or unintended harm in your use of AI, e.g. inclusion of bias testing, and mitigation steps where issues are identified.

Security & Privacy: Maintaining data protection and security protocols through your use of AI, e.g. assigning responsibility for monitoring AI security and upholding data principles.

Appropriate level of risk: Establishing clear, detailed AI risk management procedures, e.g. alignment of AI risk management with strategic, operational and project risk registers.

Adaptability: Aligning AI governance principles with existing practices and forums to ensure smooth adoption.

Template: AI governance setup

Key roles and accountable leads

In this section, agree and assign clear roles and responsibilities for your organisation’s governance and adoption of AI.

This will help maintain accountability and decision making. Assigning the right people to key roles is crucial, ensuring each person has the authority and skills to make decisions in their area of responsibility.

A primary responsibility will be to ensure internal and where required, 3rd party resources are in place to support AI adoption and management activity.

Role/Group	Responsible for	Authority and skills	Name / Team	Contact details
Overall accountable lead	Strategic oversight and decision making			
Business owner / project lead	Ownership of AI delivery and outcomes (day-to-day involvement)			
AI / Technical lead	Design, performance and technical assurance (internal / external subject matter expert)			
Data protection / Risks / Ethics representative	Compliance with data protection regulation, reviewing ethical and bias risks			
External advisors	Support, service expertise (e.g. AI Technical Consultant, Change Manager)			

Template: AI governance setup

Decision-making rights

In this section, define the authority and boundaries for all AI decision making in your organisation, where either formal review and approval (e.g. strategic decisions, AI business cases) or delegated decision rights (AI operational decisions) are appropriate.

For overall AI decision making, define this as follows:

- ❖ **Tier 1 strategic organisational decisions:** made by *[Role/Group]*, at *[meeting]*
 - ❖ **Tier 2 departmental decisions:** made by *[Role/Group]*, at *[meeting]*
 - ❖ **Tier 3 team decisions:** made by *[Role/Group]*, at *[meeting]*
-

For typical AI-related projects, define governance responsibilities and decision-making rights across these project stages:

1. **Discovery** – assessing where you are, deciding on your needs, looking for a supplier: *[Role/Group]*, at *[meeting]*
2. **Design** – working with a chosen supplier to scope, design and build to your requirements: *[Role/Group]*, at *[meeting]*
3. **Deployment** – going live with a system and embedding it into your work processes: *[Role/Group]*, at *[meeting]*
4. **Monitoring** – reviewing deployment and benefits. Identifying further development or changes: *[Role/Group]*, at *[meeting]*

Template: AI governance setup

Monitoring and reporting

In this section, describe ongoing AI monitoring and review points. This ensures that AI adoption aligns with strategic goals and project business cases and planning.

Use this section to consider how, when and by whom all AI operational or project activities will be monitored.

Area	Items	How will it be monitored?	Frequency	Responsible role	Escalation route
Strategic	Strategy business plans Roadmaps	e.g. Strategic performance and risk reporting	e.g. quarterly	e.g. Directors	e.g. to Board / Council
Departmental	Progress Skills Resources Risks	e.g. departmental KPIs, reports	e.g. monthly	e.g. Heads-of	e.g. to Leadership Team
Team	Usage Issues Feedback	e.g. team reports, 1:1s	e.g. monthly	e.g. Team managers	e.g. to Heads-of
Projects	Progress Risks Issues Benefits	e.g. project reporting, benefits tracking	e.g. weekly, at milestone points	e.g. Project Managers	e.g. to Sponsor

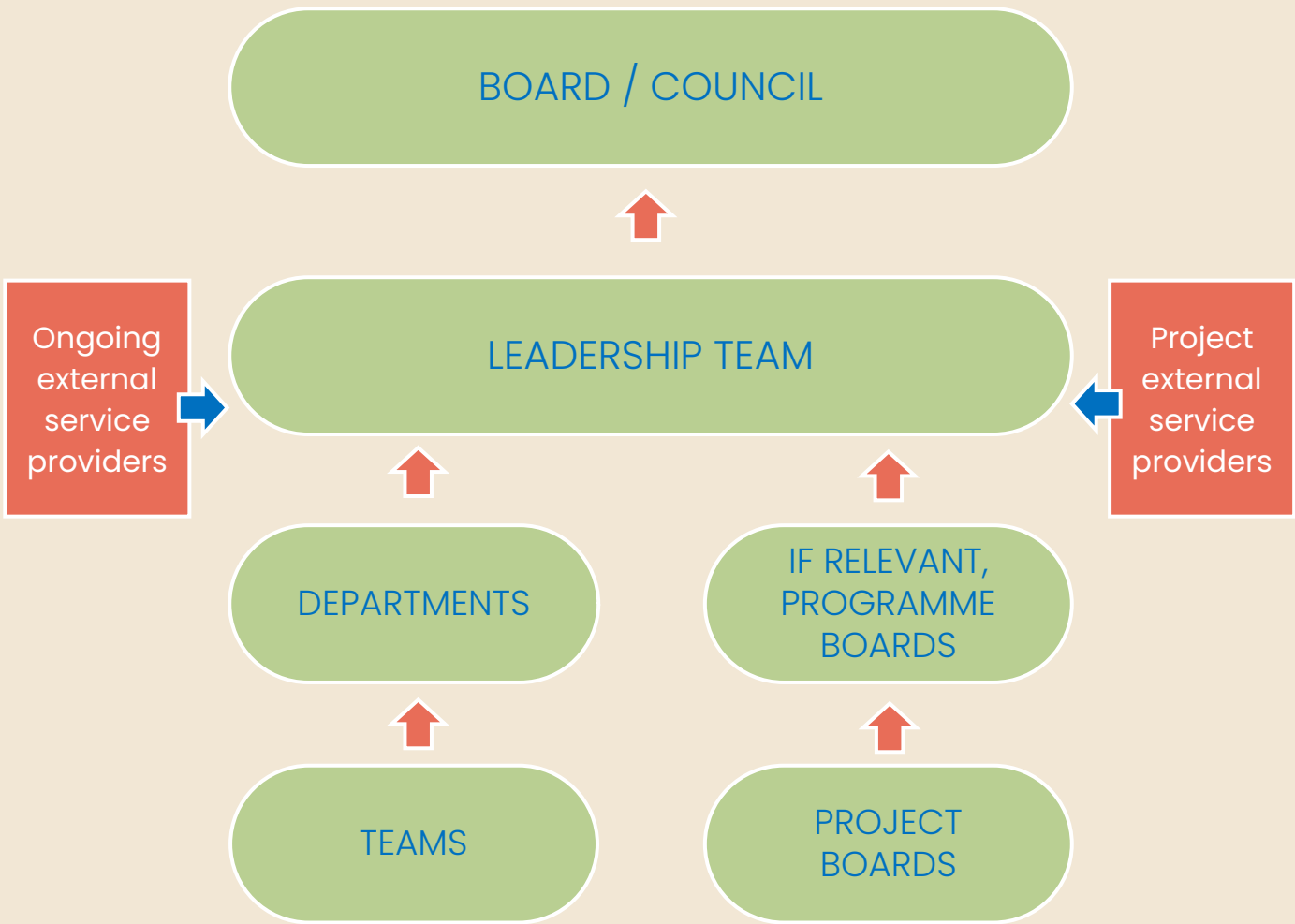
Template: AI governance setup

AI governance structure diagram

As an optional addition, you may wish to visualise both organisational and project-based governance arrangements.

The following example gives an indication of how this should be visualised.

This offers an easy way to understand the forums, decision-making rights and escalation points that exist for your adoption of AI.



KEY:



DECISION-MAKING
FORUM



REPORTING/ESCALATION
LINES



INPUTS

The 30-day AI pilot plan

We understand the power of a good pilot for any business change. Pilots are perfect for accelerated progress and learning.

Here is a simple guide on how to build and run a pilot using AI approaches, technology and tools over 30 days.

WEEK 1

Explore, test and build awareness

Goal: Understand where AI can help and try small, safe experiments.

- ❖ Identify “use case” opportunities
- ❖ Find and try out two AI tools
- ❖ Capture what worked (and didn’t): this is your “quick wins” shortlist

WEEK 2

Create your first pilot and safe user guidelines

Goal: Run one simple internal pilot and establish basic governance guardrails.

- ❖ Choose your first AI pilot
- ❖ Write 3–5 prompts for AI in this pilot area
- ❖ Draft basic safe usage guidelines
- ❖ Run your pilot for a full week

WEEK 3

Build capability and share early wins

Goal: Normalise safe, effective AI use.

- ❖ Train 1–2 colleagues on what you’ve learned
- ❖ Document your quick wins
- ❖ Identify 2–3 more low-risk tasks: these are your Phase 2 opportunities

WEEK 4

Evaluate, expand and plan for 2026

Goal: Formalise what you’ve learned and agree next steps action.

- ❖ Assess your results
- ❖ Build a simple AI skills checklist
- ❖ Create a 3-month AI action plan
- ❖ Share a short report with leadership

The 30-day AI pilot plan

SUMMARY: BY DAY 30, YOUR TEAM SHOULD HAVE:

Tick

- 1. Completed one real AI pilot ☐
- 2. Created clear guardrails for safe use ☐
- 3. Set up quick wins, reusable prompts and tools ☐
- 4. Gathered a trained group of early adopters ☐
- 5. Set out a roadmap for the next 3 months ☐



WE HOPE YOU FOUND OUR AI STARTER PACK USEFUL

To share feedback or ask further questions get in touch via info@getsavi.co.uk

GetSavi's **AI Roadmap** services

RAPID AI ROADMAP READINESS PROJECT INCLUDING:



Governance

Collaborative support on setting up AI governance and policies



Strategy

AI strategic review and investment roadmap definition



Change

Recommendations on core change management planning



Processes

Recommendations on key process opportunities with AI



Training

High-level training needs and change impact assessment

If you need further support, get in touch about our AI readiness service via Allen.Reid@getsavi.co.uk