

AI Readiness Checklist **for Charity Leaders**

Assess your charity's readiness for AI and plan your next steps with confidence.



Introduction

Artificial Intelligence is already reshaping how charities operate, engage supporters, and deliver services.

This checklist is designed to help senior leaders and boards evaluate their readiness to adopt AI safely and effectively, ensuring that any AI adoption supports your mission, values, and long-term strategy.

Tick the boxes that apply to your organisation. The more boxes ticked, the more confident you can be about your readiness and where to focus next.



Governance and Strategy

Clear governance and strategic alignment are essential when adopting AI.

This section looks at whether AI is discussed at board level, who is responsible for driving it forward, and whether ethical considerations are built into your decision-making. Strong leadership foundations ensure AI adoption supports your mission and values.

- ☐ We have discussed AI at board level, considering both risks and opportunities
- ☐ Our leadership team understands how AI could support our mission and strategic goals.
- ☐ We have a named person or team responsible for exploring AI in our organisation.
- ☐ Ethical considerations are part of all our digital decision-making processes.

Total ticks:



Data Readiness

AI relies on quality, secure and well-managed data.

Here, we explore whether your organisation's data is accurate, accessible, and handled responsibly. Data readiness ensures you can get value from AI tools while protecting the privacy and trust of supporters and beneficiaries.

- ☐ Our supporter and service data is accurate, well-segmented, and securely managed.
- ☐ We have clear data governance and privacy policies that extend to AI use.
- ☐ We understand how AI tools might use, process, and store our data.
- ☐ We have reviewed compliance with GDPR and other relevant regulations.

Total ticks:

Skills and Culture

Technology is only as effective as the people who use it.

This section looks at leadership knowledge, staff openness to digital change, and whether you have access to the right expertise. A positive culture towards innovation is key to successful AI adoption.

- ☐ Trustees and senior leaders have basic awareness of AI and its potential impact.
- ☐ Staff are open to digital change and have access to relevant training opportunities.
- ☐ We have access to external expertise for AI-related projects when needed.
- ☐ Our organisation has experience of adopting new technologies effectively.

Total ticks:

Ethics and Risk

AI brings great opportunity, but also ethical and social considerations.

This section focuses on how well your organisation has thought through fairness, accountability, inclusion and ongoing oversight. Building in ethics from the start helps ensure AI is used responsibly and sustainably.

- ☐ We have guiding principles for responsible AI use (e.g., transparency, fairness, accountability).
- ☐ We have considered how AI might impact jobs, equality, and inclusion within our organisation.
- ☐ We have a process for reviewing and monitoring AI implementations regularly.
- ☐ We are aware of sector guidance on ethical and sustainable AI.

Total ticks:



Technology and Infrastructure

A strong technical foundation underpins any successful AI initiative.

This section explores whether your systems can integrate with AI tools, if you have appropriate cybersecurity measures, and whether resources exist to support implementation and growth.

- ☐ Our IT systems and platforms are AI-ready and can integrate with AI tools.
- ☐ We have cybersecurity measures to manage risks associated with AI tools and data.
- ☐ We have a budget allocated for testing and scaling AI solutions.
- ☐ We understand the ongoing maintenance and support requirements of AI systems.

Total ticks:



Interpreting Your Results

Your score shows how prepared your organisation is to adopt AI safely and effectively. AI readiness is a journey, whether you're just starting out or already exploring AI, use these results to guide your next steps and track your progress over time.

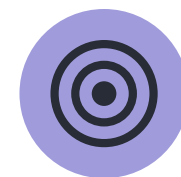


0-10 ticks
Early Stage

You've started the conversation, this is your first step towards AI readiness.

You are beginning to consider AI but have foundational gaps to address first. Focus on building leadership understanding, data readiness, and clear governance before embarking on any AI adoption.

Next step: *Prioritise board-level discussions about AI's role, review your data management practices, and set ethical guidelines to shape future adoption.*



11-20 ticks
Developing

You have solid building blocks, now it's time to strengthen and experiment.

You have some AI readiness elements in place and can begin exploring pilot projects while continuing to strengthen your data, governance and skills foundations.

Next step: *Select one low-risk AI pilot, invest in training for senior leaders and staff, and develop an AI policy to guide responsible use.*



21-25 ticks
Ready

You're ready to explore AI with confidence and purpose.

Your organisation has strong governance, data and cultural foundations in place, positioning you to confidently adopt AI and scale successful initiatives.

Next step: *Expand your AI roadmap, identify high-impact opportunities, and invest in ongoing monitoring to ensure ethical and sustainable adoption.*



Next Steps for Your *AI Journey*

Your AI readiness score is just the start. We can help you take practical, strategic steps to explore AI safely, ethically and effectively, through services including:



AI readiness and adoption guidance

Identify where AI can support your mission and develop a clear, ethical adoption plan.



AI for fundraising and engagement

Discover how automation and AI-driven insight can improve donor engagement and retention.



Data and digital infrastructure review

Ensure your systems and data are secure, well-managed, and ready for AI integration.



AI ethics and governance support

Build responsible policies and frameworks to manage risk and maintain stakeholder trust.

We work with charities and ethical organisations, helping leaders adopt digital technologies responsibly and for maximum impact.

Contact us today at info@giantdigital.co.uk or visit giantdigital.co.uk to explore how we can support your AI journey.



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