

Navigating AI in Membership Organisations

People, Trust & Ethical Challenges

8 May 2025

Welcome & Introductions



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Jen Watkins

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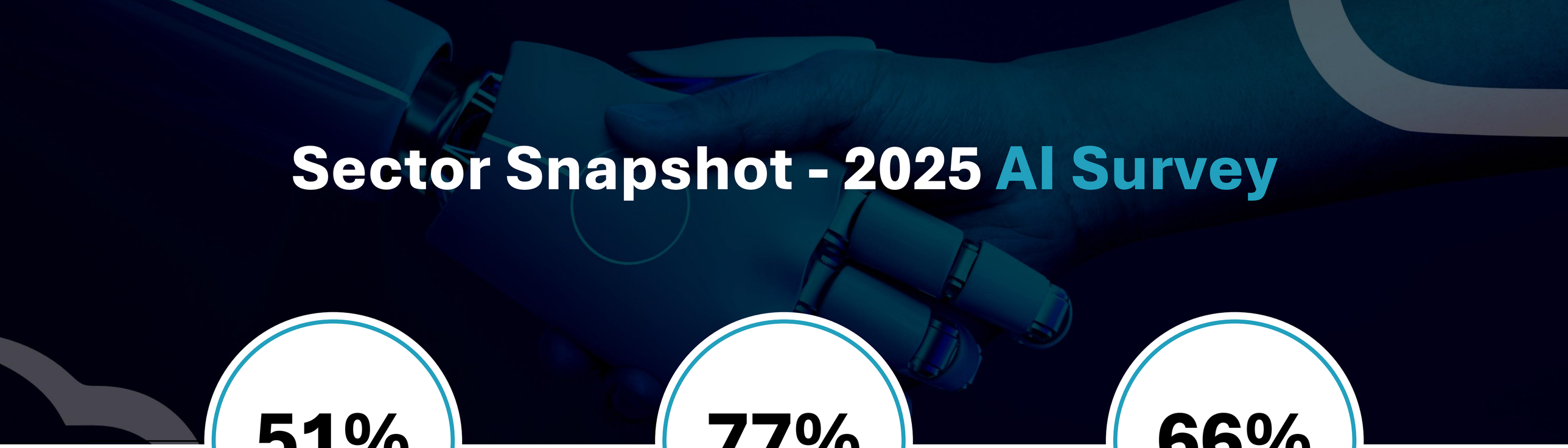
Lara Williams

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Why Change?



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Sector Snapshot - 2025 AI Survey

51%

only somewhat knowledgeable

77%

see ‘time dividend’ as top benefit

66%

worried about data privacy

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Confidence vs Readiness



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expect better member engagement

84%

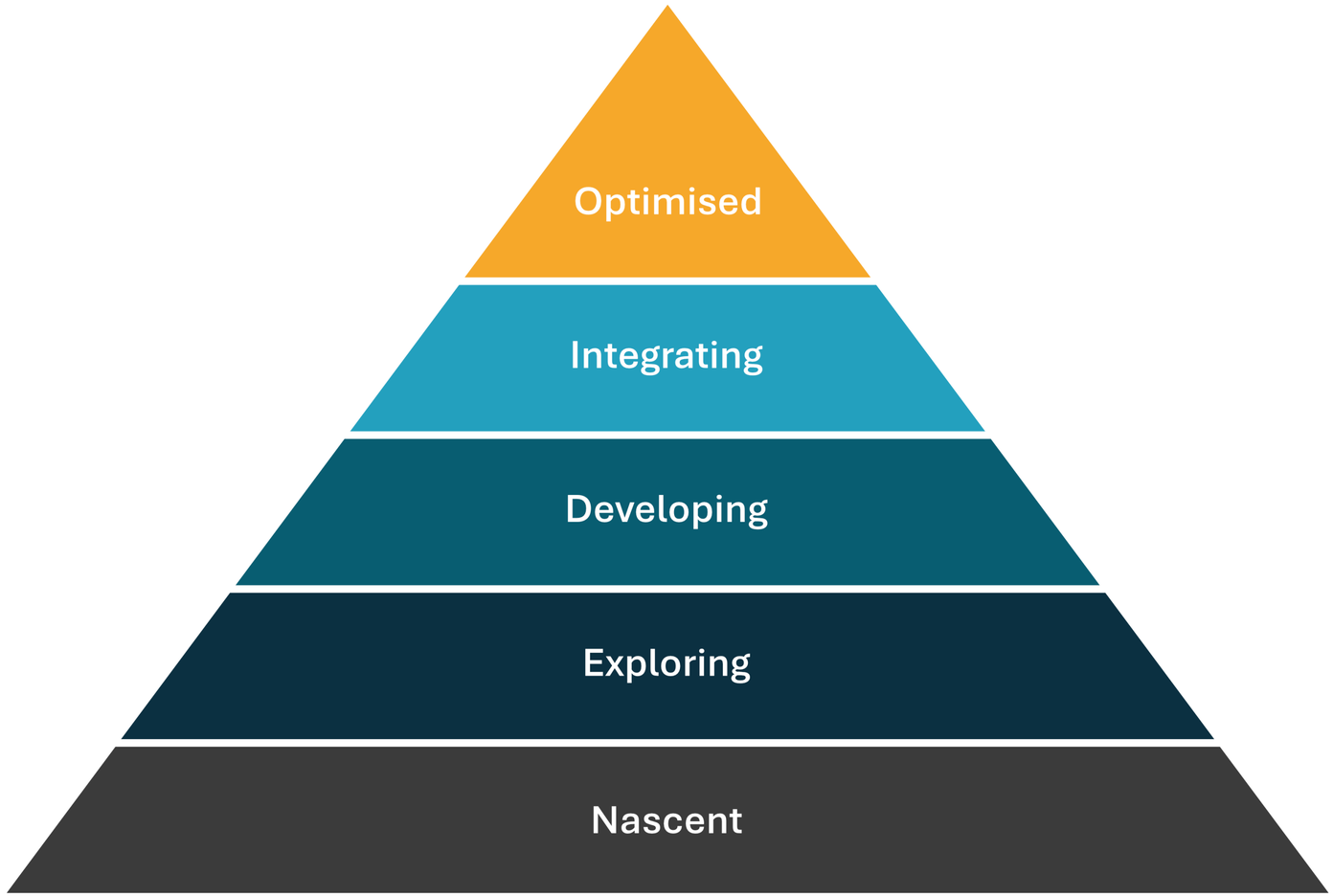
feel ready to support staff

13%

What do People want?



The 5-Stage AI Maturity Model



Level 1 - Nascent

People	Little / no awareness; Trustees do not see AI as relevant
Processes	Manual, reactive methods
Technology	Standard office tools only; No AI functionality or supportive infrastructure
Data	Incidental, unstructured data
Governance & ethics	No AI policy, minimal GDPR training; Trustees unaware of privacy / AI risks

Recommendations

- Basic awareness sessions and training
- Begin documenting key process
- Assess IT capabilities
- Review data sources
- Identify early AI ambassadors
- Draft an initial AI and data statement

Level 2 - Exploring

People	Some staff are curious; Trustees / leadership begin discussions
Processes	Early pilots (e.g. ChatGPT, chatbots)
Technology	Standalone AI tools tested
Data	Basic cleansing and standardisation
Governance & ethics	Informal updates to data / privacy policies; Draft initial AI & ethics charter

Recommendations

- Facilitate workshops and invite external expertise to develop understanding
- Document pilot projects and capture feedback
- Explore budget friendly, off shore solutions
- Document data and assess quality
- Develop AI Ethics Charter

Level 3 - Developing

People	Active use of AI tools in select functions; Emergence of AI champions / working groups
Processes	AI insights inform decision making; Processes re-engineered based on pilots
Technology	Multiple pilots running; Limited integration
Data	Regular audits; Defined data governance roles
Governance & ethics	Formal AI policies and compliance reviews; Use of PIAs / DPIAs

Recommendations

- Establish structured training and mentorship
- Document successful pilot processes for scaling out
- Plan integrations
- Establish data governance framework
- Implement AI Risk Checklist
- Formalise internal guidelines

Level 4 - Integrated

People	AI accepted across teams; Ongoing training on new AI tools
Processes	AI embedded in key workflows; Decision making utilise AI insights
Technology	Well integrated AI systems; Scalable infrastructure
Data	High-quality structured data in real time; Consistent approach to data integrity
Governance & ethics	Comprehensive AI policies, regular DPIAs; Transparent, ethical reviews and trustee oversight

Recommendations

- Expand AI training
- Communities of practice
- Standardise AI practices through continuous improvement
- Invest in scalable tech
- Maintain strict data quality
- Share AI principles with all stakeholders

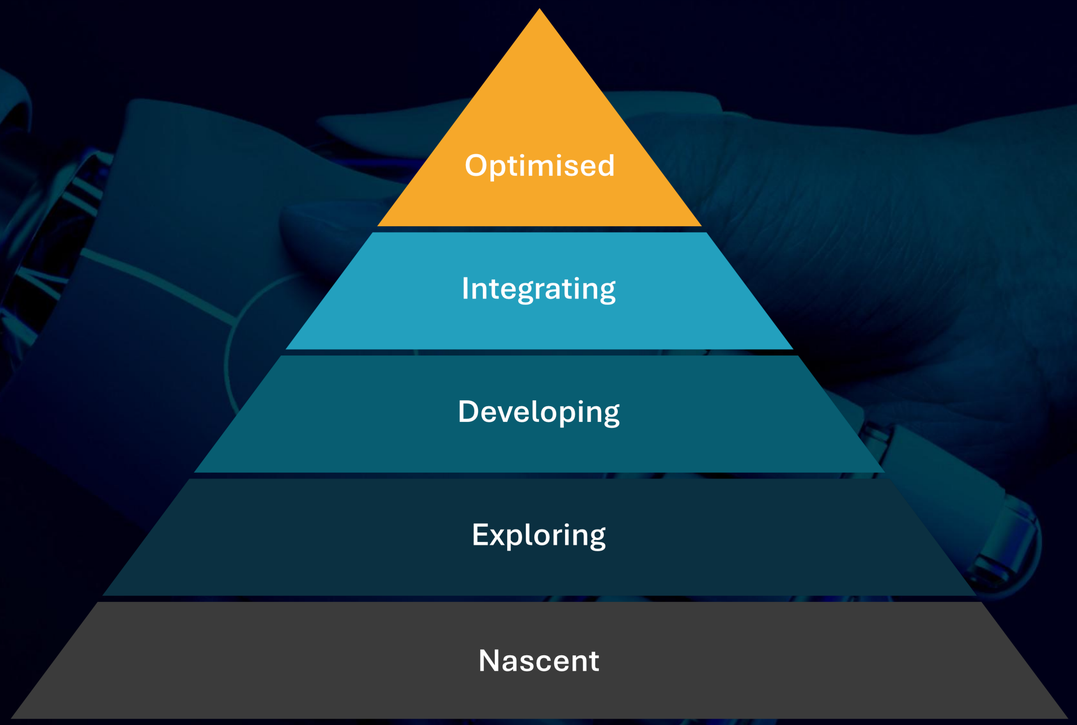
Level 5 - Optimised

People	AI fully integrated into culture; Empowered and innovative
Processes	Decisions driven by real-time AI insights; Continuous improvement embedded
Technology	Advanced, comprehensive AI ecosystem; Seamless integration across enterprise
Data	Managed as a strategic asset; Continuous real-time analytics
Governance & ethics	Dynamic, routinely updated policies; Active, ethical oversight; Public transparency reports and dashboards

Recommendations

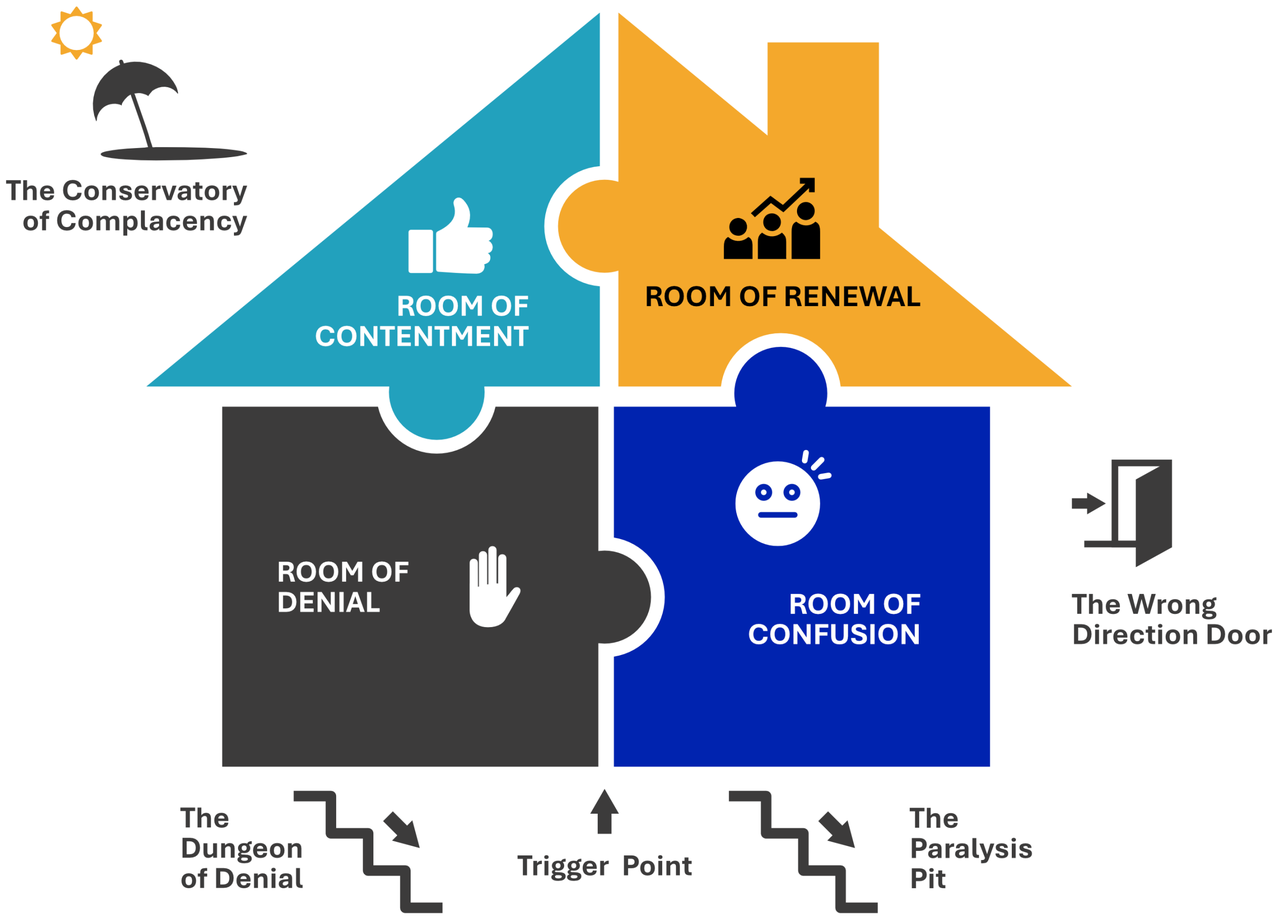
- Maintain ongoing professional development
- Embed Agile techniques
- Upgrade cycle for emerging technologies
- Advanced data quality protocols embedded
- Regular external audits and updates of policies

Where Are You Now?



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Mindset Matters - The Change House



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Driving Adoption - The 4 Cs

COMMITMENT

COURAGE



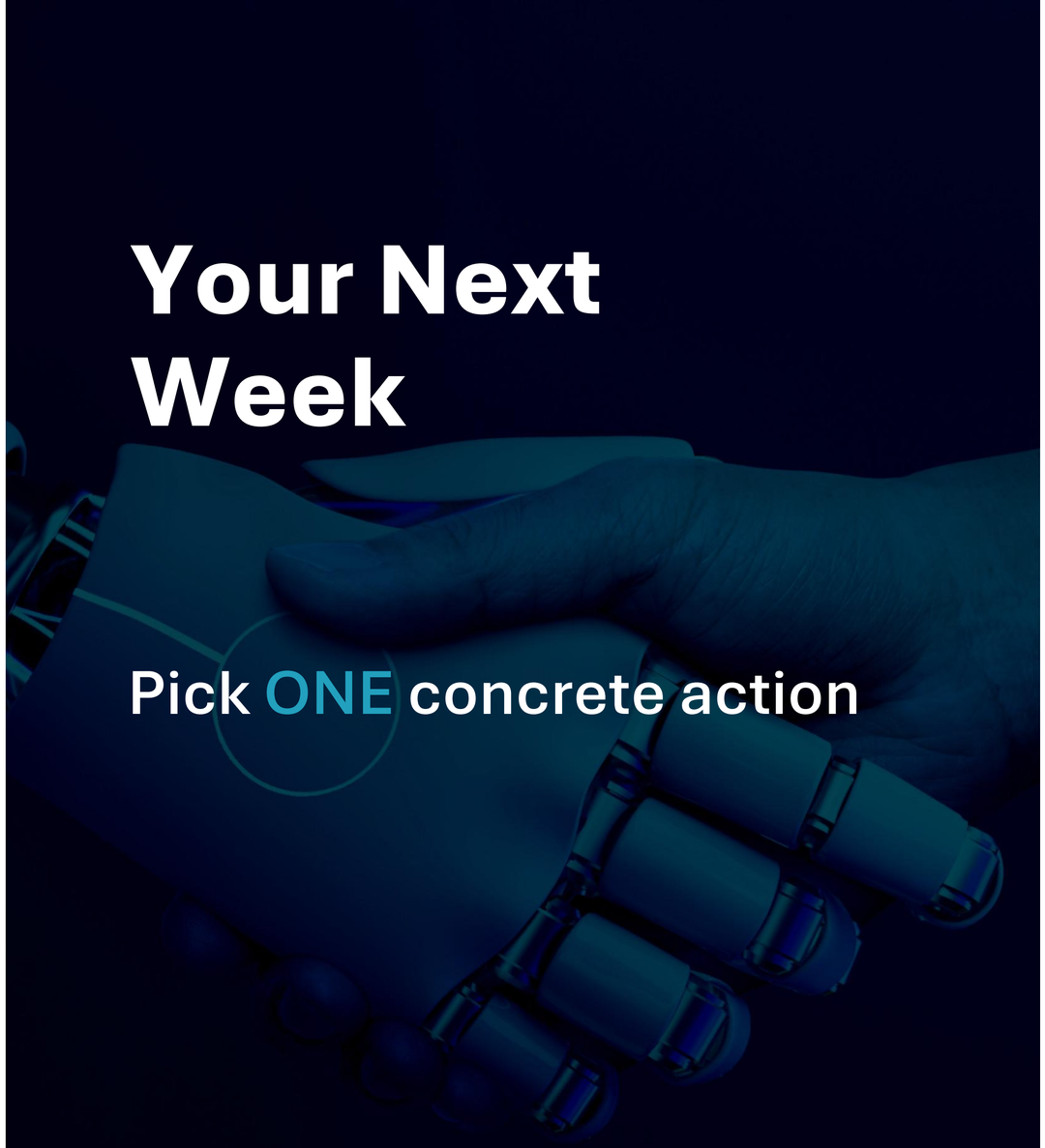
CONFIDENCE

CAPABILITY

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Your Next Week



Pick ONE concrete action

- [ ] Schedule basic awareness sessions
- [ ] Capture all sources of data
- [ ] Identify early AI ambassadors
- [ ] Draft an initial AI and data statement

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How We Can Help



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Thank You!
Let’s shape AI together - Questions?
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