

SCVO AI guidelines v1.0

Purpose

These guidelines are designed to support SCVO staff to use AI tools effectively and responsibly. Because AI and associated technologies are changing very rapidly, this guidance provides high-level principles rather than exhaustive detail. The key point is to be ready to spot potential and try new things, but ensure that we don't put people, data or our reputation at risk.

Background

AI tools and platforms have developed very rapidly since 2022: AI is a general-purpose technology that is finding its way into lots of digital products and processes. Many SCVO team members have been trying out a variety of AI tools and processes. This guidance is designed to help people keep trying new things and learn, but do this responsibly.

Scope

Many core IT services (eg Office 365, Salesforce) now have AI features built in. Using these tools is covered by our main IT policy. This guidance is aimed more at new use cases of standalone AI tools, for example:

- Microsoft CoPilot
- Google Gemini
- ChatGPT
- Claude

And other generative AI tools, mostly accessed via a user account on the web or as a mobile app. New tools are being released very frequently, so this guidance is not exhaustive.

Other guidelines to be aware of

- [SCVO IT use policy](#)
- [SCVO Data Protection policy](#)

SCVO values and AI

Committed and accountable

- We'll use AI with care
- We'll take responsibility for our use of AI

Responsive

- We recognise that AI tools are developing rapidly, so we're open to continuously adapting
- We seek and respond to feedback from people using our services

Supportive

- We use AI tools where they improve the quality and efficiency of our services
- We'll ask where we need support, and managers and experts will provide guidance and support promptly where they can

Progressive

- We'll support each other to learn together
- We'll be transparent about what does and doesn't work

Bold

- We recognise that digital and technology is changing rapidly
- We're not afraid to try new things, and we're open to changing the way we work where this leads to improvements

Good practice to follow

- **Keep personal and commercially confidential data safe**
 - Never put personally identifiable or commercially sensitive information into AI tools
 - Check and review the data storage and security policies of any tools that you do use
 - Avoid free third-party tools, as they frequently re-use inputs and prompts in training data
- **Consider alternatives to AI**
 - AI is more energy-intensive than other IT processes
 - An advanced Google search might take a minute more to craft but could give you a better result
 - Suggested pivot tables in Excel might help you spot ways to analyse data without using AI
- **Be up front and seek consent where appropriate**
 - For example, don't use AI notetakers that are always on by default – check and get consent from other meeting participants first, and then choose to start note-taking/transcription
 - If you're sharing something that is completely or mostly-AI generated, be transparent about how you've produced it
- **Avoid 'lazy prompts' which can lead to bad results**
 - Generative AI tools 'make things up' – this means they can be unreliable tools for researching factual information. If you're using AI tools to help you find factual information, make sure you check original definitive sources rather than just copying and pasting an AI-generated preview.
- **Use detailed prompts, add context and be ready to refine results**
 - Given more context and background, most AI tools will give better results when you provide them with more detail
 - You can often improve initial results by refining them with follow-up prompts
- **Review output carefully and maintain your critical judgement**
 - Always give yourself enough time to review AI output and fact-check it where necessary. Check through to original data sources if necessary

- Make sure you are paying enough attention to spot a plausible, but wrong answer

Examples of good use cases

- Meeting transcription and summarisation – routine meetings
- Summarising key points from a published report
- Pulling out high-level trends from anonymised qualitative data
- Getting help with drafting routine, non-confidential content (eg social media posts, routine emails)

Examples where care is needed

- Producing longer-form original content, especially reports where you are referencing guidance or other people's research
- High-stakes meetings where key decisions or judgements are made and need to be carefully recorded (eg the percentage of a pay settlement)
- Recording workshops or meetings that are discussing sensitive or confidential topics. How would you respond to a Subject Access Request in this scenario? AI transcripts or summaries would mean you had many more places to search for information.

Examples you should avoid

- AI 'standing in' for human insight and expertise
- Using AI to generate responses to the public without reviewing each response or extensively testing the system
- Using free third-party tools to support a live, public-facing core service
- Using AI extensively without referencing the fact that you've used it
- Do not put personal or commercially sensitive data into an AI system

How to get help if you're unsure

- Your line manager
- IT Support
- Rhonda
- John F

Resources and learning

- [SCVO guide to AI](#)
- [AI Playbook for Charities](#)
- [ICO guidance](#)

v1.0 30 June 2025 incorporates feedback from AI in practice group