Towards a consensus roadmap for the use of AI in the Armed Forces charity sector – event summary statement

Introduction and context

The *Exploring the Role of AI in the Armed Forces – Seeking Priority Consensus in the Community* event held in October 2024 set out to develop a consensus roadmap for the use of AI in the Armed Forces charity sector by discussing its use, future potential, and potential negative consequences with stakeholders from academia, industry, government, funders and the charity sector. The event programme overview can be found in Text Box 1.

Text Box 1: Overview of topics and presenters of the AI Exploring the Role of AI in the Armed Forces

Opening comments

1. Michelle Alston: Chief Executive; Forces in Mind Trust
2. Dominic Murphy: Head of Research; Combat Stress and King's College London

Session 1: What is AI?

3. Daniel Leightley: Demystifying AI: Separating Hype from Reality
4. Zoe Amar: AI Adoption in Charities: Trends, Challenges, and Future Directions
5. Nicholas Cummins: AI Unmasked: What is Real Artificial Intelligence? A speech analysis example

Session 2: Opportunities and risks of AI

6. Stuart Middleton: Using Large Language Models in Research?
7. Samantha Ahern: Advice on Designing & Implementing AI Tools
8. Stella Harrison: AI Regulation: Challenges and the Future

Session 3: Discussions and consensus

9. Roundtable discussion with delegates

With increasing demands on Armed Forces charities, and a reduction in income[1], there is a pressing need to consider the role of AI to enhance efficiency, expand operational capacity, and offer targeted support to members. However, introducing AI brings unique ethical (responsibility) and regulatory challenges, including trust issues, issues of untangling the hype from reality[2], and this underscores the importance of responsible, transparent practices.

To capture attendees' perspectives on AI adoption, pre- and post-event surveys were conducted. Initial responses indicated that many viewed AI as complex and potentially risky, citing limited resources, data organisation, data privacy concerns, and the need for clear guidelines from Government, Information Commissioner's Office and Charity Commission as key barriers to adoption and implementation. However, post-event feedback revealed a shift in understanding, with several attendees expressing a significant improvement in their perception of AI's role and

[1] Help for Heros, One Million Fewer Brits Giving to Military Charities, 2024.
[2] BMJ Military Health, Personalised Digital Technology for Mental Health in the Armed Forces: the potential, the hype and the dangers, 2022.

trustworthiness, particularly when risk mitigation strategies and the reality of AI were discussed. Attendees identified high-impact areas for AI application, such as mental health support, marketing to increase donation income, and crisis intervention support, suggesting an openness to exploring AI's potential to complement human-led services in these sensitive areas.

The following represents a synthesis of the key points raised during the event.

Current landscape

The adoption of AI reflects both a growing interest and a set of complex challenges. Survey results and discussions during the event revealed that while 61% of charities currently employ AI in some capacity, this use is largely operational, focused on automating repetitive tasks. Only a small fraction of these charities used AI strategically to drive long-term innovation, highlighting a gap between AI's day-to-day applications and its transformative potential. This disparity is primarily due to limited data literacy, privacy concerns, the need for clear understanding of AI's capabilities and limitations, and the freedom charities have to use AI with regards to legislation.

A significant challenge remains around AI and data literacy and skills, as many charity staff require upskilling to exploit AI's full capabilities, under regulatory and governance risks, and ensuring suitable accountability. Understanding AI's potential, limitations, and ethical considerations is essential, particularly for Armed Forces charities that often handle sensitive information. Privacy concerns also weigh heavily, as AI systems dealing with personal and often sensitive data must comply with stringent data protection regulations, like GDPR, to maintain beneficiary trust. The lack of guidelines and clarity on managing AI-driven data processes compounds these concerns, leaving charities in need of robust, compliant AI direction.

In their opening remarks, Michelle Alston of the Forces in Mind Trust and Dominic Murphy from Combat Stress highlighted the distinctive requirements of Armed Forces charities. They outlined AI's potential to enhance operational efficiency and support critical services, such as mental health and crisis intervention, while underscoring the importance of responsible, responsible AI practices tailored to the unique demands of Armed Forces-focused organisations. Both speakers emphasised that AI adoption in this sector should align with specific responsible AI considerations and strategic objectives to be effective and trusted.

Additionally, anticipated updates to the Charity Digital Code of Practice for 2025[3] signal a timely effort to address these challenges. This update will provide clearer guidance (but just guidance) on digital transformation and AI integration, focusing on key areas like leadership, data security, skills development, and adaptability. By doing so, the updated Code aims to support charities in responsibly navigating the opportunities and risks associated with AI.

While AI is gaining traction within the sector, significant barriers continue to hinder its strategic adoption. Addressing these challenges through improved skills training, regulatory clarity, and robust ethical practices will be crucial in unlocking AI's full potential for the Armed Forces charity sector.

Opportunities for AI

[3] Charity Digital, Upcoming changes to the Charity Digital Code of Practice, 2024.

AI offers substantial opportunities for Armed Forces charities to streamline operations, enhance strategic decision-making, and strengthen donor engagement, provided it is used thoughtfully, transparently, and responsibly. Key areas where AI can provide value include automating repetitive tasks, aligning with business workflows, supporting decision-making, and optimising fundraising efforts. However, the integration of AI must be guided by critical thought, addressing the challenges of bias, discrimination, and regulatory compliance to ensure its ethical application.

One of the main opportunities lies in automating simple tasks. AI can handle administrative functions such as summarising meeting minutes, processing routine paperwork, and managing schedules. These tasks, often time-consuming, can be efficiently managed by AI, freeing staff to focus on higher-order strategic activities requiring critical thinking and creativity. However, AI's limitations must be acknowledged, managed and mitigated. To maintain trust, organisations should transparently communicate when and how AI is used. Before implementation, consensus on specific tasks AI can reliably perform should be reached, based on evidence of its effectiveness and alignment with the organisation's mission.

AI can assist in directing beneficiaries to appropriate services by leveraging data on individual needs and available resources. This can streamline referrals, reduce wait times, and improve service efficiency. However, this may fall foul of Software as a Medical Device regulation. Nevertheless, the human element remains essential, particularly in high-stress or crisis situations, where empathy and nuanced understanding are irreplaceable. AI should serve as an assistive tool in triage, complementing rather than replacing human judgement.

Fundraising represents another area where AI can significantly enhance operational effectiveness. By analysing donor behaviour patterns, AI can predict trends, tailor engagement strategies, and identify potential new donors. These insights enable targeted outreach and more effective allocation of resources, increasing donation income. When integrated into existing operational workflows, AI has the potential to maximise impact, particularly in times of financial constraints. However, these benefits must be balanced with transparency and accountability to maintain trust among stakeholders.

The effective adoption of AI requires addressing the digital divide between organisations of varying sizes and resources. Small charities often lack the capacity to develop robust AI policies, highlighting the need for government and regulatory support. As charities explore the use of AI, they must critically consider the ethical implications, regulatory challenges (e.g. understanding "software as a medical device" versus "AI as a medical device"), and risks of bias in algorithms and data. Collaboration between government, industry, and the charity sector can provide the necessary support to overcome these barriers.

To build trust, charities must adopt AI systems that are transparent, accountable, and inclusive. AI assurance practices and explainable AI models tailored to the context of the organisation can help foster trust and reliability. While technical transparency (e.g. white-box models) may not always be achievable or comprehensible to non-technical stakeholders, organisations should focus on ensuring accountability and fairness, aligning with principles such as those outlined by UNESCO: Proportionality and Do No Harm, Safety and Security, Right to Privacy and Data Protection, Multi-stakeholder and Adaptive Governance & Collaboration, Responsibility and

Accountability, Transparency and Explainability, Human Oversight and Determination, Sustainability, Awareness & Literacy and Fairness and Non-Discrimation.

Leaders in the Armed Forces charity sector should be encouraged to adopt a tone that focuses on opportunities rather than risks, emphasising the potential of AI to align with organisational workflows and community needs. Charities have the unique ability to act as circuit breakers within communities, driving positive change and bridging gaps through responsible AI adoption. By embracing AI with a transparent, evidence-based approach, and prioritising the development of internal AI policies, organisations can maximise benefits while managing limitations and fostering long-term trust.

Recommendations

To facilitate responsible and effective AI adoption in the Armed Forces charity sector, government agencies, the Charity Commission, and other regulatory bodies must take the lead to encourage innovation. Looking ahead, the following recommendations highlight key areas of focus:

1. Government and regulatory bodies should prioritise AI literacy and skill development initiatives across the charity sector, particularly targeting senior leadership. These efforts should focus on building an understanding of AI's responsibilities, implications, capabilities, regulations and limitations, providing a solid foundation for informed and responsible adoption. This includes addressing biases, responsible AI challenges, and data literacy to ensure a well-rounded approach to AI use.
2. Instead of mandating "explainable AI" models, regulatory bodies should advocate for AI systems that balance performance with transparency and accountability. This includes encouraging the adoption of AI assurance practices and responsible guidelines to minimise bias and enhance trust among stakeholders. Such models should be accessible and relevant to the charity context, focusing on practical accountability rather than purely technical transparency.
3. Governments and sector leaders should foster partnerships across Defence, charity, and industry sectors to address shared challenges in AI adoption. Collaborative efforts in data handling, AI development, and regulatory compliance can enable a unified approach to responsible AI use. By addressing the digital divide between large and small organisations, such collaboration can ensure inclusivity and shared learning.
4. Developing government-backed governance frameworks and establishing a legislative and strategic framework are essential to empower charities for sustainable AI integration. Governance frameworks should focus on transparency, oversight, and alignment with organisational values, building trust in AI through robust practices that address technical concerns such as bias, discrimination, and data security.
5. Guidance on how using AI for fundraising can enable charities to optimise data insights for targeted outreach and donor engagement, particularly among younger audiences. This should include strategies to counter misinformation, promote digital literacy, and enhance transparency to maintain trust as charities expand their donor bases.
6. Regulatory bodies should promote the use of environmentally sustainable AI applications. This involves encouraging AI solutions that align with organisational goals

to reduce carbon footprints and promote long-term sustainability, ensuring that AI contributes positively to environmental and social objectives.

These recommendations underscore the importance of collaborative, well-regulated AI adoption in the Armed Forces charity sector. With support from government and regulatory bodies, charities can integrate AI responsibly, securely, and sustainably, aligning technological advancements with their mission to serve communities effectively.

Conclusions

While AI holds significant potential to enhance the charity sector, its adoption must be approached with caution, clarity, and purpose. Critical questions remain: does the sector truly need AI, and will it deliver meaningful improvements, or merely add complexity? The government and regulatory bodies such as the ICO and the Charity Commission must urgently provide clear guidance on risk appetite, protections, and regulatory frameworks to ensure organisations can navigate AI integration responsibly. Furthermore, it is vital to assess whether the focus should be on leveraging AI to increase operational efficiency and/or exploring the transformative possibilities of generative AI to drive innovation. It is important to note that AI is not the endpoint of any solution, but the enabler. Striking a balance between these priorities will be key to maximising AI's benefits while ensuring it aligns with the values and goals of the charity sector.

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