Wates Family Enterprise Trust

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Artificial Intelligence (AI) Policy and Statement
November 2026

Purpose

The Wates Family Enterprise Trust recognises that artificial intelligence (AI) tools are becoming increasingly common across society and the charitable sector. AI offers opportunities to improve efficiency, accessibility, learning, and collaboration. At the same time, it raises important questions regarding transparency, privacy, fairness, accountability and environmental impact.

This statement explains how we currently approach AI in our work as a grant maker and what applicants, grant holders and partners can expect from us.

Our Principles

Our use of AI will be guided by five principles:

1. Mission-Aligned
   We will only use AI where it supports our charitable mission, values and commitment to creating positive social impact.

   AI should enhance the quality of our work and relationships, not replace them.

2. Human-Led Decision Making
   Funding decisions will always be made by people.

   While AI may assist with administration, analysis, note-taking, or summarising information, it will not determine which organisations receive funding.

   Professional judgement, lived experience, trustee oversight and staff expertise remain central to our decision-making processes.

3. Transparency
   We will be open about how and when AI is used.

   Where AI tools are used in meetings, events or interactions with applicants and grant holders, we will communicate this clearly and seek consent where appropriate.

   We will share AI transcript notes from meetings with those involved for accuracy and agreement.

4. Privacy and Data Protection
   We will use AI in accordance with UK GDPR, the Data Protection Act 2018 and our internal data governance policies.

   Confidential, personal or sensitive information will only be used with approved and secure systems that meet our data protection requirements.

5. Fairness and Accountability
   We recognise that AI systems can produce inaccurate, biased or misleading outputs.

   Any information generated by AI will be reviewed by staff before being relied upon or shared externally.

   We will review our use of AI regularly to ensure it remains fair, proportionate and aligned with best practice.

Policy Updated: November 2026
Policy Approved: November 2026
Policy Review Date: November 2027

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Appendix

How We May Use AI

We may use AI tools to support:

- Meeting transcription and note-taking.
- Drafting and summarising documents.
- Research and information gathering.
- Administrative efficiencies.
- Data analysis and reporting.
- Accessibility tools, including transcription and captioning.

In all cases, outputs will be reviewed by staff and will not replace professional judgement.

What We Will Not Use AI For

We will not use AI to:

- Make grant awards or funding decisions.
- Automatically approve or reject applications.
- Replace human assessment of applications.
- Process sensitive information through unapproved systems.
- Substitute meaningful engagement with applicants and grant holders.

AI and Grant Applications

We recognise that applicants may choose to use AI tools to support the preparation of funding applications.

We have no preference as to whether applicants use AI.

However, we expect applications to:

- Accurately reflect the organisation's work and intentions.
- Be based on genuine knowledge and experience.
- Contain factually correct information.
- Reflect the applicant's own context, voice and priorities.

Organisations will not be advantaged or disadvantaged because they have used AI in preparing an application.

Accessibility and Inclusion

We recognise that AI can improve accessibility by supporting people with disabilities, neurodivergence, language barriers and other communication needs.

We welcome and support the responsible use of AI where it helps reduce barriers to participation.

Environmental Considerations

We recognise that AI technologies can have significant environmental impacts due to energy consumption and computing requirements.

As part of our wider commitment to responsible practice, we will seek to use AI proportionately and consider environmental implications alongside potential benefits.

Continuous Review

AI technologies are developing rapidly.

We will continue to test, learn and review our use of AI to ensure it remains ethical, lawful, transparent and aligned with our mission and values.

This statement will be reviewed annually and updated as our practice evolves.

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Policy Approved: November 2026
Policy Review Date: November 2027