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AI setup for CSOs

CSOs and AI webinar series, webinar 2

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Agenda

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How AI models work in 2026

New models require a new approach

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HOW AI MODELS WORK IN 2026

AI now requires lighter prompts and a stronger setup

Claude Fable and ChatGPT Astra are powerful reasoning models: they plan their own steps, then check and validate their own output.

It plans the steps

Give it the goal and the finish line. Steps you write can block a better plan, and create confusion.

It checks its own work

It tests, rereads, and fixes before it reports back. You still check facts and sources.

It does the work

It’s not a chat anymore. It works in your files and apps and hands back finished documents.

It works longer alone

One request can run for hours, across files and tools.

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The 7 layers of an AI setup

Online, you'll often see this called the AI harness.

1	**Custom instructions**	Who you are and how you want it to answer
2	**Context**	What AI knows about your work and organization
3	**Skills**	The method and frameworks you use in a job
4	**Connectors**	The tools AI can use, like your email and cloud storage
5	**Models**	The right model and effort for the task
6	**Prompt**	What you need from this one task
7	**Process**	Your review, decisions, and sign-off

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Layer 1: Custom instructions

Who you are and how you want AI to answer

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LAYER 1: CUSTOM INSTRUCTIONS

Tell AI who you are

Your custom instructions are the first thing AI reads, every time you prompt it.



What you do

Your role, your organization and what it does, your country, and the languages you work in.



How it should answer

Length, format, and how direct feedback should be. Your organization's voice can be defined here as well.



What it shouldn't do

Invent numbers or names, use usual AI writing patterns, US-centric nonprofit concepts, etc. Keep it to a few lines.

WHERE TO FIND IT

Claude: Settings → Account → Instructions for Claude

ChatGPT: Settings → Personalization → Instructions

Gemini: Not available for the Work accounts and in Europe

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Layer 2: Context

What AI knows about your work and organization

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LAYER 2: CONTEXT

Four sources of context

Your AI's memory

What AI picks up from your past chats. Check it now and then, and correct it.

Your AI's Projects

A workspace with its own files and instructions, for example one per campaign or grant.

Your folders and files

Files that carry context: concept notes, previous proposals, reports (added to a Project).

Organization pack

One document with everything AI should know about your organization.

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LAYER 2: CONTEXT

Inside an organization pack

One document you keep current and add to every AI project in your organization.

Identity
Name, location, size, and legal form

Mission and vision
The change you work for and the future you want

Programs and impact
What you do, how, why, and with what results

History
Key milestones and lessons learned

Fundraising model
Who supports you, what they get, and how you raise funds

Voice
Optional, if custom instructions or a skill don’t cover it

Impact stories
Beneficiary stories you have permission to tell

Proven examples
Proposals, campaigns, and solutions that succeeded

Key documents
Links to your strategic plan and annual reports

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Layer 3: Skills

The method and frameworks you use in a job

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LAYER 3: SKILLS

A skill teaches AI how to do a job



What it is

A folder with a text file (SKILL.md) that describes your method step by step, and includes templates, checklists, constraints, and examples AI should follow.



What it's for

For well-defined methods and frameworks, or clear, recurring workflows: a pitch, a campaign plan, a grant report. Every chat and every colleague gets the same steps and approach.



Unlike a saved prompt

A prompt is one request you have to find and paste each time. A skill holds the whole method, and AI uses it on its own when the task fits, or when you call it by name.

WHAT'S AN .MD FILE

Markdown: plain text with simple marks for headings and lists. Any editor opens it, and AI reads it well.

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LAYER 3: SKILLS

What’s inside a skill

A good skill is short: a page or two of method. Detail goes in the files it points to.

Name and description

When to use the skill, and when not to. AI reads these two lines to decide whether to use it.

Method

The steps you follow, in order, in your own words, with the frameworks you use.

Checks

What a result needs before it counts as done: facts, length, format, tone.

One example

A sample of the format the skill produces. Your track record stays in the organization pack.

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How AI uses a skill

AI reads only the descriptions, so many skills don’t slow it down.

1

Reads the descriptions

With every prompt, AI sees only the name and description of each skill: about 2 lines each, however many skills you have.

2

Opens the one that fits

When the task matches, or when you call the skill by name, it loads the full method into the chat.

3

Pulls files when needed

Templates and examples open only for the step that uses them. In Claude you see “Reading [skill]” as it works.

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LAYER 3: SKILLS

Three ways to get a skill

Start with a job you do often and already do well.

Describe or upload it

Explain how you do the job, or upload your methodology, a framework, a guide, or a book. AI builds the skill from it.

Record it

Record your screen while you do the job once. AI turns the recording into a skill.

Install it

Add skills from Anthropic, Google, or others. Read them first: they tell AI what to do.

Then improve it

After a few rounds of corrections, ask AI to learn from them and update the skill.

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Layer 4: Connectors

The tools AI can use, like your email and cloud storage

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LAYER 4: CONNECTORS

Connectors decide what AI can reach

Drive

Finds and reads your documents, and saves drafts where your team works.

Email

Searches threads and drafts replies. You decide what gets sent.

Calendar

Checks dates and helps plan campaign timelines around your team.

Permissions

Give access only to what a task needs, and check what AI may do without asking.

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Layer 5: Models and effort

The right model and effort for the task

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Match the model and the effort to the task

Frontier models	**Fable, Opus, Astra, Argon**	Strategy, planning and hard analysis
Balanced models	**Sonnet, Terra, Pro**	Proposals, reports and content
Fast models	**Haiku, Luna, Flash**	Summaries, extraction and simple edits

Effort: use lower effort for the first draft, then higher effort to improve it.

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Know when you need an agent, and when a chat is enough

When you need one

Creating or editing files, or collecting information from websites. Claude runs agents on paid plans, ChatGPT on every plan in desktop app.

Use the desktop app

Although different tools use agents differently, it is advised to use a desktop app on your computer, instead of running it from a browser.

Try it

Ask it to build a cash flow tracker for your organization in Excel or Google Sheets, with monthly income, expenditure, and balance.

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Layer 6: Prompt

What you need from this one task

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LAYER 6: PROMPT

With the setup in place, the prompt states the objective

Goal
What you need, why, and who will read it.

Your view
Your hunch, and an invitation to push back.

Material
Which files, notes, or skill AI should use.

Finish line
What done looks like: length, format, language.

EXAMPLE

Draft a one-page pitch asking a local supermarket chain to sponsor our summer camp. The reader is their marketing manager. My hunch is they care more about local visibility than education. Challenge that if our material says otherwise. Use our organization pack and the pitch skill. Under 500 words, in Ukrainian.

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Layer 7: Process

Your review, decisions, and sign-off

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LAYER 7: PROCESS

AI drafts, people decide

Keep a person in the loop at every step.



Review

Check facts, numbers and sources. AI can report a task as done when it isn’t.



Iterate

Give specific feedback, or ask another model to challenge the draft.



Decide

Strategy, priorities and promises to beneficiaries and supporters stay with you.



Send

A person signs, sends and submits. If you didn’t read it, don’t send it.

People make decisions about people. AI never decides who receives a service or a grant.

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WRAP-UP

What goes where in your AI setup

Layer	What goes there	Rule
Custom instructions	You, your organization, how AI should answer, and your non-negotiables	A few lines. The details about your organization go in the organization pack.
Context	Memory, projects, your files, and the organization pack with your voice	One organization pack, one owner, kept current.
Skills	The method for a recurring job: steps, checks, and one example of the format	A skill points to the organization pack and never copies it.
Connectors	Access to your Drive, email, and calendar	Give access only to what the task needs.
Models	The model and effort for each task	Lower effort for the first draft, higher effort to improve it.
Prompt	The goal, your view, the material, and the finish line for this task	Say what you need and what done looks like. Leave the steps to AI.
Process	Review, iterate, decide, and send	If you didn't read it, don't send it.

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