B4A DATA & AI STUDIO
DECISION INTELLIGENCE

PFN-01 · FOUNDATION TRUSTEES · FOUNDATION STAFF

THE TRUSTEE DASHBOARD, FIVE LENSES

Compass for Foundations.

Are we meeting our duties as trustees, with the proof at hand? One view across the five areas a foundation answers for, refreshed on your rhythm, so trustee meetings start from current facts instead of assembled binders.

5	CRA	1	Quarterly
lenses, one trustee view	aligned indicator library	page read before each meeting	rhythm, or the one you set

WHAT YOU GET

Five lenses, one view. Legal and filings, giving and payout, grantee checks, investments, and trustees and board.

Payout, tracked against the rule. Disbursement quota position visible all year, not discovered at filing time.

Grantee due diligence, logged. Checks, renewals and pending items in one place, with dates and documents.

A one-page trustee brief. What changed, what needs a decision, what was resolved. Five minutes before each meeting.

Built on Compass. The same governance dashboard our nonprofit boards use, tuned to foundation duties.

WHAT TRUSTEES SEE

Five lenses, current state

Legal and filings	ON TIME
Giving and payout	3.8% VS 3.5% RULE
Grantee checks	2 PENDING
Investments	POLICY ALIGNED
Trustees and board	QUORUM MET

FIVE LENSES · ONE TRUSTEE VIEW · REFRESHED ON YOUR RHYTHM

ILLUSTRATIVE, FICTIONAL DATA · YOUR VERSION IS BUILT FROM YOUR RECORDS

B4A DATA & AI STUDIO BUILD4ABUNDANCE.COM

Book a 30-minute discovery call

PRICING ON REQUEST · FIXED FEE, AGREED BEFORE WORK BEGINS
CONTACT@BUILD4ABUNDANCE.COM

HOW IT WORKS

01
Send a note. The decision you face and the data you hold.

02
A 30-minute call. Frame the question, agree the scope.

03
Weeks, not quarters. AI explores, people decide, sources shown.

WHO IT IS FOR

Trustees, foundation chairs and foundation staff of private and family foundations.

Trustee duties do not wait for filing season.

See your payout position and pending checks all year. **The five lenses can be live within the quarter.**

Data → AI explores → **Humans decide.**

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How your data becomes a decision.

You hand over simple exports, nothing more. AI does in hours what would take an analyst weeks: scanning every record, pattern and comparison at once. People then check what matters against the source, and you receive a clear recommendation, not a pile of tables.

Step 01
What we collect
Your filings, grant records, payout figures, investment policy and meeting calendar. Documents and exports you already hold.

Step 02
AI explores at scale
AI assembles the five lenses from your records and the public registers, flags pending items and keeps every figure tied to its source.

Step 03
People decide what is true
Every figure that matters is traced back to your records. A person reviews the findings and writes down what the data cannot tell you.

Step 04
You decide with confidence
Trustees who open one page, see their duties current, and spend the meeting on granting decisions.

Data becomes information, information becomes knowledge, and knowledge becomes a decision. AI does the sorting at a speed and scale no team can match. People decide what the numbers mean. That split is fixed, and it is why you can trust the result.

Your data stays yours.

No identifiable data leaves your systems. We work from aggregated exports: groups, segments and totals, never individual donors or clients.

Never used to train AI models. Your data is used for your project only, inside tools with training switched off.

Agreed before anything moves. What data is shared, where it is held and who sees it is written down before work begins.

Deleted when you ask. Working copies are removed at the end of the engagement, on request, with confirmation.

Why it matters: the people you serve trusted you with their information. Our method is built so that trust is never put at risk, and your privacy officer can verify every step.

Ethical AI, in writing.

People stay accountable. A named person signs off before anything reaches you or your board.

Numbers come from sources, never from the model. AI explores and compares; it never supplies a figure of its own.

We say where AI was used. In plain words, in every report, and on request at any time.

We say what the data cannot show. Every analysis carries its limits. An average is not anyone's odds.

No harm. No invented numbers or people, and stories about people are told with dignity.

Part of something bigger. Compass for Foundations is the stewardship organ of your Decision Layer: the always-current picture of your foundation that the largest enterprises are now building for themselves. Start with the duties you already hold.

Book a 30-minute discovery call: calendly.com/j-habib01/30min
contact@build4abundance.com

Data → AI explores → **Humans decide.**