

AI Working Labs Program Overview

A summary of everything built so far for the Wells Fargo PCI pilot: curriculum, materials, recruitment tools, and the one item that still needs your input before we launch.

Updated July 22, 2026 · For the July 22 check-in

32

MATERIALS BUILT

7

LABS DESIGNED

90 min

PER SESSION

1

ITEM FOR YOUR INPUT

01 / WHERE WE ARE

The curriculum is built and ready for review

The full seven-week curriculum is designed, written, and assembled. Every lab has a facilitator guide (a detailed script for how the session runs, minute by minute), a participant kit (what each person receives and works from), and practice data sets so nobody is working on real sensitive information until they are ready. A recruitment invitation with a readiness self-assessment is also complete and ready for distribution.

Everything is organized in a single hub that links to every material. We will share access to the hub separately so your team can browse the full set at your own pace.

Each week, participants build something real

The signed scope covers seven topic areas. Instead of one lecture per topic, we reorganized the program so each session produces a finished piece of work that participants actually need. The scope topics (quality, accuracy, governance, data safety) repeat as habits inside every session until they become automatic.

1

First Safe Win

Participants complete the full safe-data process from start to finish and leave with one usable piece of writing. The safety habit starts on day one.

AI FOUNDATIONS + GOVERNANCE & RISK

2

Writing + the Org Brain

Each pair builds a permanent workspace loaded with their organization's voice and identity, then uses it to produce real grant applications, donor letters, or memos that sound like them, not like AI.

QUALITY & ACCURACY

3

Board-Ready Reporting + the Second Chair

Messy inputs (meeting notes, partial spreadsheets, emails) become polished narrative summaries. Then participants learn to run a critique pass that catches unsupported claims and risky statements before anything ships. From this point on, nothing goes out without a second review.

REPORTING & NARRATIVE

4

Data: Clean and Extract

Participants take a realistically messy spreadsheet (the kind most organizations deal with monthly) and clean it up with a full audit trail, then extract the meaningful patterns from the data.

METRICS & DATA REVIEW

5

Numbers to Narrative to Deck

Cleaned data becomes a verified impact story, then a presentation. Participants learn visual judgment (what deserves a chart and what should stay a sentence) and walk out with a board-ready slide deck built in minutes because the thinking was already done.

METRICS + REPORTING, COMBINED

6

Agents and the Wider Toolbox

The critique process from Lab 3 becomes a standing automated reviewer. Participants also get a guided look at the broader AI landscape (research tools, document analysis, and how each tool fits a different job) so they know what to reach for when.

WORKFLOW DESIGN + GOVERNANCE APPLIED

7

Build Session and 90-Day Roadmap

Participants assemble everything they built across the program into one documented workflow, present it to the group, and set 90-day priorities. The showcase generates the evidence for the pilot summary.

BUILD SESSION & ROADMAP

Program structure

Every session follows the same rhythm

A live demonstration on realistic practice data, an extended hands-on build block where participants do the work themselves in pairs, and a group debrief where pairs share what they made. Sessions are 90 minutes, live on Teams, and recorded.

Buddy pairs and real work

Two participants per organization work together throughout the program. Before Lab 1, each pair identifies 3 to 5 real deliverables they actually need to produce this quarter (grant sections, reports, donor communications). The labs point at that real work, so participants leave with finished items they would have had to produce anyway.

Three homework levels, chosen weekly

Keep Pace (30-45 min): one repetition of the week's skill on a small real item. **Ship It** (1-2 hrs): a full deliverable through the process, verified and sent. **Build Ahead** (3+ hrs): stretch work for participants who want to go further, building toward the final showcase.

Data safety is practiced, not just taught

Every session uses the same safe-data process: remove identifying information before working in AI tools, do the substantive work, then return results to the protected environment where the details reassemble. Participants practice this round-trip from Lab 1 and repeat it every week until it becomes habit. The classification system that decides which data can travel (green for what moves freely, yellow for what needs to be de-identified, red for what never leaves) is taught in Lab 4, where the program moves onto spreadsheets, and it is applied from there on.

Eight working habits carry across all seven labs

We built a set of short reference cards for habits that apply in every session: run a critique before sending anything, always trace claims to their source, ask for options with consequences, and five more. These are the practices that stick after the labs end.

Complete materials inventory

Every item below is designed and ready. Most are interactive web documents, so participants can search, filter, and navigate easily. The intake form and the technical setup guide are Word files your team can edit and send, and a PDF of this overview is linked at the bottom of the page.

MATERIAL	WHAT IT IS	STATUS
Curriculum Hub	Front door to everything. Links to every material with search, filtering by category, and quick descriptions.	Ready
Curriculum Map	The full seven-lab design showing what each session covers, how the scope topics weave through, and how homework builds week to week.	Ready
Recruitment Invitation + Readiness Quiz	A shareable page for prospective participants: what the program is, who it is for, what to expect, and a 15-question self-assessment that helps nominated people gauge their fit before they confirm a seat.	Ready
Intake Form	Pre-program questionnaire collecting current tools, comfort level, real work backlog, and hardware details.	Ready
Technical Setup Guide	Step-by-step instructions for installing the AI tools and confirming everything works before the first session.	Ready
7 Facilitator Run Sheets	Detailed session scripts (one per lab): timing, demonstrations, build blocks, talking points, common problems and how to handle them.	Ready
7 Participant Kits	What each participant receives for each lab: instructions, templates, reference guides, and prompts to use during the session.	Ready
Practice Data Packs	Realistic mock data for labs that involve spreadsheets, messy inputs, or reporting (Labs 1, 2, 3, 4, 5). Nobody works on real sensitive data in the room; they learn the motions on practice material first.	Ready

MATERIAL	WHAT IT IS	STATUS
Answer Keys and Capture Sheets	Facilitator reference files: expected outputs for the practice data (Labs 3, 5) and the showcase capture sheet used to record each pair's final presentation (Lab 7).	Ready
8 Edge Cards	One-page reference cards for working habits that apply across all seven labs (run a critique, trace your sources, ask for consequences, and five more).	Ready

One item settled, one open for the July 22 conversation

Both items below have been on the table since June. The first is now built into the materials and described to nominated organizations, so we are treating it as settled unless you tell us otherwise. The second is a provisioning call that is still yours to make, and the curriculum works either way.

1. Settled: how Wells Fargo PCI staff participate alongside nonprofit partners

The program is built primarily for nonprofit and community partners, who work hands-on with their own real data and systems throughout. The roughly five Wells Fargo PCI staff in each cohort take a different posture: they learn the same skills and see the same demonstrations, but they join from a personal device and practice on public or non-WF material rather than moving any WF data outside the protected environment.

The reason is straightforward: WF data stays inside the WF environment, period. PCI staff carry the judgment and the patterns back as internal champions who can recognize where AI helps, without the program ever asking them to move WF information.

Every lab's materials are written on this basis, and it is what nominated organizations read in the invitation. Tell us now if it does not match your expectations, because changing it means reworking the participant materials.

2. Open: Codex access for advanced participants

Lab 6 (Agents and the Wider Toolbox) demonstrates a coding tool called Codex, which builds simple software tools from plain-language descriptions. Think of it as a way for someone who is not a programmer to create a small utility (a data cleanup script, a report generator) by describing what they want in ordinary English.

As built, Codex is named in the Lab 6 tool map and shown only if a participant asks, so it takes no time from the core session. The open question is whether WF wants to go further and provision a small number of accounts so the most advanced pairs can build with it themselves. That is a stretch option, not part of the core curriculum, and the lab runs as designed without it.

No decision needed today if you would prefer to wait. This can be added at any point before Lab 6.

What happens next

COMPLETE

Curriculum design and materials

All seven labs designed. 33 materials built, reviewed, and organized.

COMPLETE

Recruitment invitation and readiness quiz

Ready to share with prospective participants whenever your team is ready to begin recruitment.

JULY 22

Check-in: confirm the open item above

Whether to provision Codex for the advanced track. The two-audience approach for PCI staff is settled and already reflected in the materials.

LATE JULY TO AUGUST 21

Nominations and seat confirmations

PCI colleagues nominate the nonprofit partners they know best, one or two each, scored against a shared rubric. Nominations are due August 5. Nominated organizations receive a personal invitation along with the readiness quiz and the confirmation form, and confirmations close August 21. No organization applies cold and none is turned away: nominations beyond capacity are held for the next cohort rather than declined. Confirmed organizations fill 10 partner seats per cohort, 20 across both, alongside the roughly five PCI staff seats held in each.

2-3 WEEKS BEFORE LAUNCH

Intake and technical setup

Confirmed participants complete the intake form and set up their AI tools. Technical pre-flight confirms everyone has working access before the first session.

MID-SEPTEMBER

Labs begin

Sessions begin mid-September 2026: the Monday cohort on September 14, the Friday cohort on September 18. Two cohorts of 25 seats each, seven sessions over seven weeks at 90 minutes each. Live on Teams, recorded. Both cohorts run the same content in the same week.

Questions?

Reach Chris Jarvis at chrisjarvis@rw.institute or reply to any existing thread. We are happy to walk through any of the materials in detail or share the full curriculum hub for your team to explore directly.



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