NONPROFIT LEADERSHIP CENTER TAMPA BAY | NOVEMBER 18

Your Team Is Already Using AI. Now What?

Starting the conversation with your team

Sherylle Bates, Strategic Advisor and AI Solution Architect

HELLO

I’m Sherylle Bates

Said “Sherelle.”

BY TRADE

Management consultant

MY LOVE

Change management

THESE DAYS

Helping teams use AI responsibly

MY SIGN-OFF

Human-originated. AI-assisted.

Strategic Advisor | AI Solution Architect, AI Strategy & Adoption Lab

A STORY TO START

Tessa, a help line chatbot

NEDA ran a chatbot called Tessa on its help line.

It told activist Sharon Maxwell to lose one to two pounds a week and count calories.

NEDA took Tessa down after she shared screenshots.

> *“Every single thing Tessa suggested were things that led to my eating disorder.”*
>
> Sharon Maxwell

Scan to read the source

NPR, June 8, 2023

TODAY

What we'll do together

1. Prepare you to lead your team and manage up
2. Give you the words to start the conversation with your team
3. Walk through the checklist together at the end

This is meant to start a conversation. Don't build it without your team.

CHAT POLL

Where is your team right now?

Type the emoji in the chat.

🫣	🫡	🫠	😳
People are trying AI on their own	Leadership rolled out a tool	Both	I honestly don’t know

AGREEMENT 1

You stay the expert

TEAM AGREEMENT

We stay the experts. AI can draft, but a person on our team reads, checks and owns everything that goes out.

Checklist section 4

VICTORIA, AUSTRALIA

A Protection Worker Used ChatGPT to Help Draft a Court Report

Nearly 900	staff, almost 13%, visited ChatGPT in six months
100	cases showed signs ChatGPT may have been used
2 years	generative AI sites blocked for the department

Scan to read the source

Office of the Victorian Information Commissioner

AGREEMENT 2

Tools and Shadow AI

Shadow AI is using tools for work that your organization hasn't approved or doesn't know about.

TEAM AGREEMENT

We do our work in the tools our organization provides. If someone wants to try something else, we talk about it first, and nothing about the people we serve goes into a personal account.

Checklist sections 1 and 5

AGREEMENT 3

Know what it’s attached to

TEAM AGREEMENT

Before we connect or paste anything, we know what the tool can see. Names, case notes, health information and donor details never go in where they are not supposed to be.

Checklist section 2

Ask before you connect anything

- What can it see?
- Who else can see what it sees?
- How do I turn it off?

AGREEMENT 4

Be open about it

More human — **More AI**

Human-originated. AI-assisted.	Human-directed. AI-drafted.	Human-directed. AI-executed.	AI-originated. Human-shaped.	AI-generated. Human-approved.	AI-autonomous.

Not good or bad. It describes what actually happened.

LinkedIn Newsletter
October 14, 2026

TEAM AGREEMENT

We say when AI helped, and we're honest when someone asks.

Checklist section 6

AGREEMENT 5

Fairness

TEAM AGREEMENT

When AI touches a decision about people, we check it for fairness, and we bring the people it affects into the room.

Checklist section 10

WHY FAIRNESS MATTERS

Amazon's Resume Screening Tool Discriminated Against Women

Learned	from the resumes of the engineers already there, mostly men
Downgraded	resumes that included the word "women's"
Stopped	Engineers couldn't fix it, and Amazon stopped using it

Scan to read the source

ACLU, October 2018

THE FOUNDATION FOR YOUR TEAM

Our five beginning agreements

1. We stay the experts. AI can draft, but a person on our team reads, checks and owns everything that goes out.
2. We do our work in the tools our organization provides. If someone wants to try something else, we talk about it first, and nothing about the people we serve goes into a personal account.
3. Before we connect or paste anything, we know what the tool can see. Names, case notes, health information and donor details never go in where they are not supposed to be.
4. We say when AI helped, and we're honest when someone asks.
5. When AI touches a decision about people, we check it for fairness, and we bring the people it affects into the room.

YOUR CHECKLIST

Build it with your team, not for them

People adopt what they help build. Fill it in together. It’s a starting point.

Section 4

1 You stay the expert

Section 1 + 5

2 Tools and Shadow AI

Section 2

3 Know what it’s attached to

Section 6

4 Be open about it

Section 10

5 Fairness

Section 10: start with all five agreements, in your team’s own words.

MANAGING UP

The manager in the middle

Use a meeting you already have.

Bring evidence and momentum, not a problem for leadership to solve.

Show leadership what a policy could look like.

YOUR NOTE TO LEADERSHIP COVERS

What we use AI for	What's working	What we decided not to use it for, and why	What we need	One question: could our checklist start an AI policy?

IT’S BEEN A PLEASURE

Two ways to connect with me

Talk it through with me

Book 30 minutes if you want to help your team see themselves in this shift.

Tell me how today landed

It takes one minute. Use code **TEAMKIT** and I’ll send the Team AI Ground Rules Kit, with meeting agendas and talking points for leading this with your team.