Team Responsible-Use Checklist: Completed Example

A working agreement for teams that are already using AI

This example is filled in by a made-up team, the Family Services team at a made-up organization called Bayside Community Partners. Every name and detail is invented. Use it to see what finished answers can look like, then write your own with your team.

How to use this

Fill this in with your team in one 30 to 45 minute conversation. It isn't a policy. It's how your team agrees to work with AI today, whether or not your organization has a policy yet, and it gives leadership something concrete to build on when it writes one.

Come back to it every month or two. The tools change, and so will your answers. Type straight into the boxes, or print it and fill it in by hand.

Team	Family Services, Bayside Community Partners (8 people)
Manager	Dana Reyes
Date we agreed to this	December 2, 2026
Date we'll review it	February 3, 2027

1. What we use today

Start with what's true, not what should be. Nobody gets in trouble for anything listed here. You can't guide what you can't see. Count AI that comes built into tools you already use, like Canva, Zoom or your donor database, not only standalone tools like ChatGPT.

Tool	Organization account or personal?	Standalone or built into a vendor tool?	Who uses it	What we use it for
Microsoft Copilot	Organization (licenses given out in September)	Built into Microsoft 365	Whole team	Summarizing internal meeting notes, first drafts of internal emails
ChatGPT, free version	Personal	Standalone	Three case coordinators	Rewording flyers and newsletter blurbs
Canva's AI features	Organization	Built into Canva	Outreach coordinator	Social graphics and caption ideas
Grammarly	Personal	Standalone	Two coordinators	Editing their own writing
Zoom meeting summaries	Organization	Built into Zoom	Dana	Notes from team meetings, never from meetings with families

2. What never goes into an AI tool

Check each one your team agrees to, and add anything specific to your work.

- ☑ Names, contact details or stories of the people we serve
- ☑ Donor names, giving history or contact details
- ☑ Health, case, legal or financial records
- ☑ Staff personnel matters, such as performance, pay, discipline or hiring decisions
- ☑ Passwords, account numbers or login details
- ☑ Anything covered by a confidentiality agreement, a funder restriction or a data-sharing agreement
- ☑ **Our addition:** Anything from a family's intake form, even part of it
- ☑ **Our addition:** Photos of the families we serve

When someone isn't sure, they ask this person before pasting anything in:

Dana, or Luis Ortega, our operations director

Removing a name doesn't always make information safe. If someone could recognize the person from the details, treat it as identifying.

3. Where AI helps us, and where we check first

Sort the kinds of work your team does into three columns.

Go ahead	Check with someone first (name who)	Not for AI on our team
First drafts of internal emails and agendas	Anything going to a funder (Dana)	Case notes and messages to families
Rewording flyers and newsletter copy we wrote	Social posts about our programs (Dana)	Decisions about services or eligibility
Summarizing public research and articles	Trying a tool nobody on the team has used (Luis)	Anything with a family's details
Brainstorming event and outreach ideas		Staff performance notes

4. Who reviews before it goes out

AI can draft. A person on our team owns everything we send.

- ☑ A person reads every word before anything leaves our team
- ☑ Facts, numbers, names, dates and quotes are checked against the original source
- ☑ The person who sends it is responsible for it, whatever tool helped
- ☑ Anything about a specific person we serve gets a second reader

What we're sending	Who reviews it	What they check
Newsletter blurbs	Outreach coordinator, then Dana	Dates, program names, tone
Grant report sections	Dana, then the development director	Every number against our data system, and the funder's AI guidelines
Social posts	Outreach coordinator	No identifying details, photo permission on file
Internal meeting summaries	Whoever ran the meeting	Decisions and owners captured correctly

5. Accounts and settings

- ☑ We use our organization's account when one exists
- ☑ Where a tool lets us turn off the use of our data for training, we turn it off

Personal accounts are okay for:

Rewording text we wrote ourselves that has no family, donor or staff details in it

Who can answer questions about a tool's settings:

Luis Ortega, operations director

6. Being open about AI use

- ☑ We check each funder's guidelines before using AI on a grant application or report
- ☑ If someone asks whether we used AI, we answer honestly

Our rule for saying AI helped:

We say AI helped when it drafted a meaningful part of anything public, and always when a funder asks.

7. When something goes wrong

Mistakes will happen. What matters is that people say so quickly.

If someone shares something they shouldn't have, they tell this person the same day:

Dana

☑ Nobody is blamed for speaking up quickly

Where we write down what happened (which tool, what was shared, when, what we did next):

The "AI notes" page in our team's shared drive

8. How we learn together

Where we share what's working:

The last 10 minutes of our Tuesday team meeting, plus a shared doc called "What's working"

How often:

Weekly for the first two months, then monthly

☑ Each of us tries this agreement on real work this month and brings back one example

9. What we bring to leadership

Use a meeting you already have. Bring what your team is learning as evidence and momentum, not as a problem for leadership to solve.

The meeting we'll use	The monthly managers' meeting with the executive director
What we're using AI for	First drafts of newsletters and internal emails, meeting summaries, summarizing public research
What's working (time, quality, capacity)	Our own estimate: about three hours a week back on newsletters and meeting notes, which we're putting into follow-up calls with families
What we decided not to use it for, and why	Case notes or anything with a family's details, because we can't yet confirm where that information is stored
What we need from leadership	A decision on the three people using free ChatGPT for work: give them organization licenses, or move that work to Copilot
One question for leadership	Is the organization planning an AI policy, and can our checklist be a starting point for it?

10. Our agreement

Who helped write this:

Dana Reyes, the six coordinators, and Luis Ortega as an advisor

Next review date:

February 3, 2027

What's next for your team

Your team has a working agreement. Here are three ways to keep going.

1. Take the free AI Readiness Scorecard

See where your whole organization stands with AI, beyond one team, so leadership has a clear starting point.

Start here: aistrategyandadoptionlab.com/start

2. Book a free 30 minute call with Sherylle

For the question your team can't settle alone, such as whether a tool is safe for client information, how to bring this to your board, or where an organization-wide policy should start. Bring your checklist, or what came out of your first meeting.

Book a time: calendar.app.google/Abgq3et2NcAcTMgV6 (Google Meet)

3. See how the AI Strategy & Adoption Lab works

Sherylle's approach for nonprofit and mission-driven teams: strategy before tools, clarity before adoption, governance before scale.

Visit: aistrategyandadoptionlab.com

Sherylle Bates, Strategic Advisor and AI Solution Architect. Sherylle works with nonprofits and mission-driven organizations on AI strategy and adoption. sherylllebates.com