Team Responsible-Use Checklist

A working agreement for teams that are already using AI

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	
Manager	
Date we agreed to this	
Date we'll review it	

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

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:**
- ☐ **Our addition:**

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

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

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

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:

Who can answer questions about a tool's settings:

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:

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:

☐ Nobody is blamed for speaking up quickly

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

8. How we learn together

Where we share what's working:

How often:

☐ 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	
What we're using AI for	
What's working (time, quality, capacity)	
What we decided not to use it for, and why	
What we need from leadership	
One question for leadership	

10. Our agreement

Who helped write this:

Next review date:

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