



WORKSHOP OUTLINE

Artificial Intelligence in the Nonprofit Space

A practical session on where these tools help, where they do not, and what to decide first

ONE SESSION

90 MINUTES

VIRTUAL

PLAIN LANGUAGE

SESSION OVERVIEW

Useful in Places. Quietly Risky in Others.

“Your staff are already using these tools. The open question is whether anyone has told them what they may put into them.”

Nonprofits hold some of the most sensitive information anyone holds: client records, immigration status, health and safety details, the circumstances that brought a family through the door. Staff under time pressure are already pasting work into free chatbots, usually with good intentions and no guidance, because no one has said what is allowed.

This session is practical rather than speculative, and assumes no technical background. Participants test real tasks from their own programs against what these tools can and cannot do, draw the lines around client information, and leave with a one-page acceptable use position a board can adopt and a question set for any vendor.

Who it is for

- Executive directors deciding whether to adopt anything
- Board members asked to approve a tool or a policy
- Program staff already using these tools day to day
- Operations and data staff who hold the confidentiality obligations

What makes it interactive

- Sorting exercise: twelve real tasks, good fit, poor fit, or never
- A real prompt written and critiqued in the room
- Red line exercise: the information that must never be entered
- The vendor question set, applied to a product you are considering
- A one-page acceptable use position drafted before anyone leaves

THE THREE QUESTIONS

What may we put into it? · Who checks the output? · What do we disclose?

THE SESSION

SINGLE SESSION · FOUNDATION

01

Where It Helps, Where It Harms, What to Decide

For organizations whose staff are already using these tools

90

minutes

Learning Objectives

By the end of this session, participants will be able to:

- 01** Describe in plain language what these tools do, and what they do not
- 02** Tell a good use case from a poor one for your own programs
- 03** Name the client information that must never be entered into a general tool
- 04** Apply your confidentiality and consent obligations to everyday AI use
- 05** Ask a vendor the questions that reveal how your data will be handled
- 06** Draft an acceptable use position your board can actually adopt

What We Cover

- What these tools actually do, in plain language, and the failure modes that follow
- Realistic use cases: drafting, summarizing, translating, and where time is really saved
- Poor fits: eligibility decisions, clinical judgment, and anything you cannot check
- Client confidentiality, and why free tools are the wrong place for it
- Consent and disclosure: what you owe the people you serve and your funders
- Vendor questions: training, retention, deletion, and where your data is stored

How Participants Engage

- Opening round: one way someone at your organization is already using it
- Sorting exercise: twelve real tasks, good fit, poor fit, or never
- A real prompt written and critiqued live, then improved
- Red line exercise: the information that must never be entered
- The vendor question set, applied to a product you are considering
- Drafting the one-page acceptable use position

KEY TAKEAWAY The risk is rarely the tool. It is that staff are already using it and nobody has decided what they are allowed to put into it.

One page your board can adopt

Organizations tend to answer this in one of two ways, and both fail. A blanket ban, which staff quietly ignore while the work still has to get done. Or silence, which is a blanket permission nobody wrote down and nobody can be held to.

The position is the middle path: short enough to read in a board meeting, specific enough that a program manager knows on a Tuesday whether something is allowed.

How it gets written

01 Name what the tools are for

The tasks where staff may use them, written in your words rather than a vendor's. Specific permission is what makes a red line credible.

02 Draw the red lines

The categories of information that must never be entered into a general tool, listed explicitly enough that nobody has to interpret them.

03 Name who checks

Any output reaching a client, a funder, or the public is reviewed by a person who is accountable for it. The tool is never the last step.

04 Decide what you disclose

What you tell the people you serve, your funders, and your board. Deciding this now is far easier than explaining it later.

The five parts of the position

PERMITTED	The tasks where staff may use these tools, named specifically.	Replaces a ban nobody follows.
RED LINES	The information that must never be entered, by category.	Protects the people you serve.
REVIEW	Who checks output before it reaches anyone outside.	Keeps a person accountable.
DISCLOSURE	What you tell clients, funders, and the board.	Prevents a later surprise.
APPROVED TOOLS	Which products are cleared, and who changes that list.	Stops quiet sprawl.

THE RESOURCE YOU RECEIVE

AI Acceptable Use Position and Vendor Questions

- The one-page position, ready to complete
- A red line checklist by information type
- Twelve vendor questions, with what to listen for
- The task sorting set, with a worked key

Supplied as a printable PDF and an editable Word document.

HOW THE SESSION RUNS

Ninety minutes, on your own organization

Instruction is kept short and tested immediately against tasks the team brings. Every segment ends with part of a real position written down.

OPENING

10 min

How is it already being used here?

Each participant names one way someone at the organization is already using these tools. The answers are usually more varied than leadership expects, and set up the session.

PART ONE

20 min

What these tools do, and what they do not

Plain language, no jargon, and the specific failure modes that follow from how they work. Confident wrong answers, invented sources, and why checking is not optional.

PART TWO

20 min

Good fit, poor fit, never

A sorting exercise using twelve real nonprofit tasks. The group places each one, then argues the cases where it disagrees, which is where the useful line gets drawn.

PART THREE

15 min

Client information and the red lines

Confidentiality, consent, and what free tools do with what you give them. The group lists, by category, the information that must never be entered.

PART FOUR

15 min

Asking a vendor the right questions

Training, retention, deletion, and location. The question set is applied to a product someone in the room is actually considering.

CLOSING

10 min

Your one-page position

The pieces assemble into a position the organization can take to its board, with a named owner and a date for review.

What participants take away

A completed one-page acceptable use position with a named owner, a red line list specific to your programs, a vendor question set, and the sorted task list showing where these tools fit your work. Templates are provided in editable form so the position can be revised as the tools change.