

A Values-Driven Framework for Drafting Your Nonprofit's AI Policy

CT Annual Nonprofit Conference

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Agenda

01 Welcome & Where We Are

02 Why It Matters

03 What We Value

04 Putting It in Writing

05 Your Next Step

How We'll Work Today



Raise a Hand

Quick polls and shows of hands, right from your seat.



Get Up and Move

Some moments we'll be out of our seats, talking with people around the room.



Work Together

Small groups and a neighbor share. Your ideas are the point.



When you hear the train whistle, head back to your seat.



Hi!
I'm Jasmine

I'm a **Data & AI Consultant** for mission-driven organizations!

I work with nonprofits in three ways:



Host training & workshops



Lead AI enablement & governance



Build custom AI tools & software



Daly Analytics

Recent Clients & Training Partners



Nonprofit
Support
Program



GiveWell





Where We Are

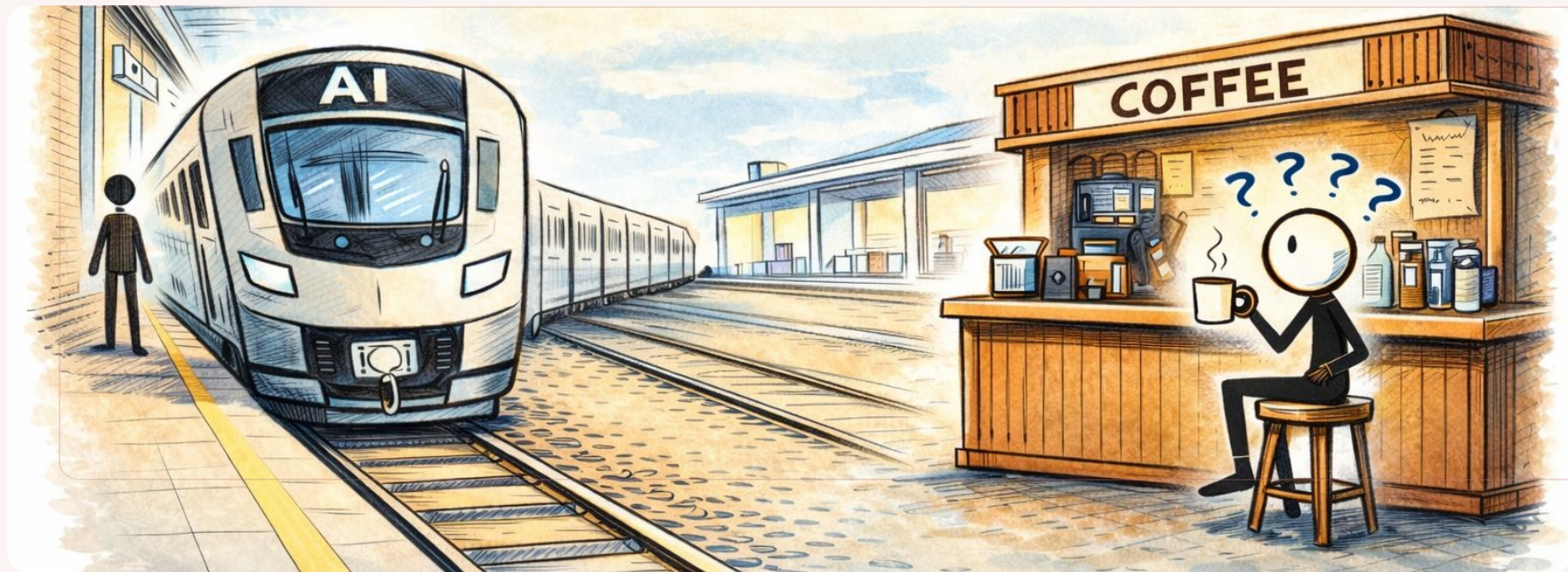
Level setting

**Does your
organization
have an **AI**
Policy?**



The AI Train Has Not Left the Station.

But You Do Need to Step on Board





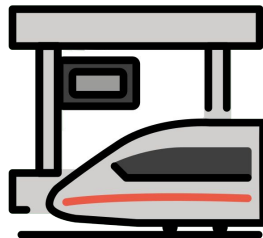
Activity – 3 min – Whole room

Where Are You in Your AI Journey?



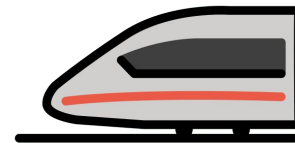
Observing

Just watching for now



Exploring

Getting curious, starting to experiment



Building

Implementing AI Solutions





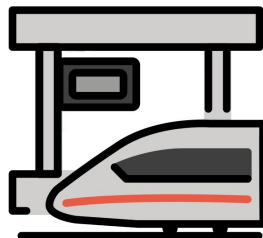
Activity – 3 min – Whole room

Where Is Your Org in Their AI Journey?



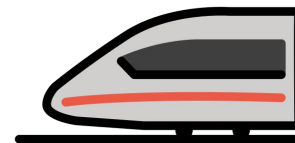
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Why It Matters

A policy only works if people see the need

The AI Governance Gap

74%

of nonprofit
professionals are using
AI tools

53%

of nonprofit
professionals have used
AI outside organizational
guidance.

38%

of nonprofit executives
say written AI guidance is
in place.

Source: NTEN and Bridgespan, 2026 State of Nonprofit AI Adoption and Governance Report (n=917)

How Sensitive Is the Data?

Where data falls depends on your organization, your team, and your mission.



Low Sensitivity

- Event flyers
- Published reports
- Website copy



Moderate Sensitivity

- Internal budgets
- Staff emails
- Draft grant narratives



High Sensitivity

- Client case notes
- Health and HR records
- Donor financial details



Activity

10 min - Whole room

What Goes In? Sorting Data by Sensitivity

1

Head to the wall

Each card names a type of data your organization might have access to.

2

Place a dot

Imagine pasting it into an AI tool. ● Low, ● Moderate or ● High? Go with your gut.

3

Do as many as you can

No wrong answers. Many depend on the situation.

4

Notice the splits

Where stickers disagree, tell us your thinking.



The Trifecta of Risk

The data you just sorted is half the story. The AI tool is the other half.

Private data



Your yellow and red data



Content from the internet



Pages and files no one has vetted



A way to send things out



To people outside your organization



What We Value

Values are what the rules grow from

Safe AI Boundaries



Always Human

“What will we always do ourselves?”

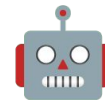
- Client intake conversations
- Crisis communications
- Service eligibility decisions



AI-Assisted

*“What can AI help with?” +
“understand deeply”*

- Grant proposal drafts
- Data analysis & reporting
- Program evaluation summaries



AI-Enabled

“What are we comfortable delegating?”

- Internal meeting summaries
- Administrative documentation
- Template creation

A simple test: What do you say when someone asks “Can we just use AI for this?”



Activity

6 min - Small group

Defining Your AI Values

1

Form small groups

3 to 5 people. Your handout has both questions.

2

First, discuss

“What will we always do ourselves?”

3

Next, discuss

“What can AI help us with?”

4



Share with the room

A few groups tell us what came up.





**The answers from this exercise
become your **values**...**

...and those become **boundaries** that start to shape your
policy.



Putting It in Writing

Boundaries become policy building blocks

Policy Building Blocks



What to Protect

Your “Always Human” work tells you what data can never go into AI tools.



Who Decides

Different boundaries need different approval levels.
Who has authority for each?



When Things Go Wrong

Accountability sits with your org, not the tool. How do you repair and adapt?

With your values and your data sorting, these are the core pieces of an AI policy.

Policy Is Just One Piece



AI Policy

What we agreed to, in writing.



Tools

Enterprise setup that makes the safe choice the easy one.



Enablement

Ongoing training that keeps people skilled and the policy alive.

All three make governance

Policy, tools, and training working together to keep AI in service of your mission.





Your Next Step

One idea to take back to your team



Activity

3 min - Pairs

Turn to Your Neighbor

1

Turn to your neighbor

Find someone close. Pairs or trios are fine.

2

What's clearer to you now than an hour ago?

3

Take turns

About a minute each. Just listen.

4

If there's time

Who at your org should be part of this?



What Comes Next?

Wherever your organization landed on the journey today, there's a next step



IF YOU'RE OBSERVING

Build competence

Hands-on AI training & capacity building for staff. Shared language, safe habits, and room for the skeptics.



IF YOU'RE EXPLORING

Set the guardrails

AI policy development, data classification, and a governance plan your staff can adhere to.



IF YOU'RE BUILDING

Implement safely

Secure tool setup and custom workflows, so staff can responsibly use AI with sensitive data and tasks.

Not sure yet? Start with a chat: jasmine@dalyanalytics.com

Thank You!

If there are any questions, I'm happy to answer them



Extra AI Resources

dalyanalytics.com/ct-nonprofit-conf



Jasmine Daly



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