



AI Navigator

Demystify AI Adoption with Your Team



Start here

Wondering if an AI solution will be a good fit? We've got you!

This guide is your friendly AI navigator. With three easy paths to follow, you choose which level of evaluation is right for you.



Outcomes

- Team alignment around which AI tools to use or avoid
- Greater clarity about whether or not AI tools are in line with your mission
- A clearer path to keeping your data safe and confidential when it comes to AI



Instructions

Follow this step-by-step approach:

1. Identify the AI-enabled tool, software, or platform you are evaluating
2. Complete the Quick Start Checklist to pinpoint which level of evaluation is best for your situation: 1. Quick & Easy, 2. Middle of the Road, or 3. Deep Dive.
3. Work through the evaluation level recommended in the Quick Start Checklist
4. Make a YES or NO decision about the AI tool in question
5. Repeat for each additional AI tool that is under consideration for adoption

Adopt AI tools that fit with your mission and keep your data safe



Level Setting

Take a few moments up front to understand to what extent you need to evaluate your potential AI technology solution. This will ensure you spend only the time you need to evaluate the AI tool in question, not a minute more.

Evaluation Levels

LEVEL 1 QUICK & EASY

When to use:

For low-risk, non-sensitive applications (e.g., AI within Canva, simple chatbots, Grammarly, AI for meeting notes, etc.)

Process:

Brief team discussion, focusing on basic alignment with organizational values and goals

Key questions to consider:

- What are the team-level benefits for using this tool?
- Are there any concerns to address prior to adoption?
- What's the plan for monitoring performance and sharing feedback and learning?

LEVEL 2 MIDDLE OF THE ROAD

When to use:

For applications with moderate impact, using non-sensitive data (e.g., non-confidential volunteer info, communications content that excludes confidential details, etc.)

Process:

Hold a team meeting dedicated to evaluation, possibly involving key stakeholders

Key questions to consider:

- All Level 1 questions
- How will we maintain human oversight with this AI solution?
- What are we hoping to gain by integrating this AI tool?
- How will we measure the effectiveness of this AI tool?
- Are there safeguards we need to put in place to ensure we're using AI ethically & effectively?

LEVEL 3 DEEP DIVE

When to use:

For high-impact applications using sensitive data or significantly altering core processes (e.g., creating new initiatives, grant writing, donor communications, etc.)

Process:

Prioritize a thorough review involving leadership, potentially external experts, & key stakeholders

Key questions to consider:

- Use the Level 3 Deep Dive evaluation on Page 5 for a comprehensive set of questions prior to AI adoption.

Find Your Evaluation Level

Check all boxes that apply to your potential AI technology solution:

- ☐ A It will handle sensitive information
- ☐ B It will impact critical decisions within our organization
- ☐ C The tool will be external-facing and/or affect key stakeholder interactions
- ☐ D Errors generated by AI could harm our beneficiaries or our reputation
- ☐ E The tool will significantly alter core functions

If you checked zero boxes,
proceed with LEVEL 1: QUICK & EASY on page 3

If you checked boxes A and/or B,
proceed with LEVEL 2: MIDDLE OF THE ROAD on page 4

If you checked any boxes C, D and/or E,
proceed with LEVEL 3: DEEP DIVE on page 5



LEVEL 1 QUICK & EASY

Work through the prompts if you checked zero boxes in the Quick Start Checklist on Page 2.

Level 1 summary

This evaluation level is for low-risk, non-sensitive applications (e.g., AI within Canva, simple chatbots, Grammarly, AI for meeting notes, etc.)

Process

Hold a brief team discussion, focusing on basic alignment with organizational goals. Use the below questions to lead the discussion.

Question 1

What are the team-level benefits for using this tool?

List them out.

Question 2

Are there any concerns to address prior to adoption?

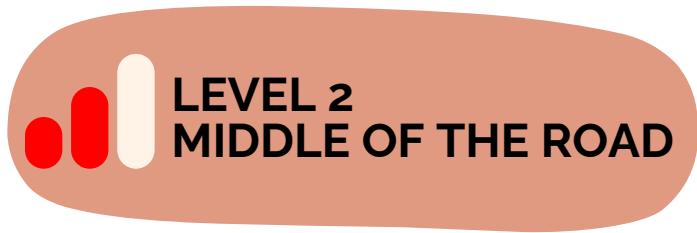
If so, what are those concerns?

How could we overcome or resolve these concerns?

Question 3

What is our plan for monitoring performance and sharing feedback and learning?

Summarize the plan.



LEVEL 2 MIDDLE OF THE ROAD

Work through the prompts if you checked any of boxes A and/or B in the Quick Start Checklist on Page 2.

Level 2 summary
This evaluation level is for applications with moderate impact, that use non-sensitive data only (e.g., non-confidential volunteer info, communications content that excludes confidential details, etc.)

Process
Hold a team meeting dedicated to evaluation, possibly involving key stakeholders. Use the below questions to lead the meeting.

Level 1 Evaluation Questions
Start with the (3) questions in the Level 1: Quick & Easy Evaluation on Page 3. Then, continue with the rest of the questions on this page.

Question 4
What are we hoping to gain by integrating this AI tool?

List all outcomes.

Question 5
How will we maintain human oversight with this AI solution?

What safeguards might we need to put in place to ensure we're using AI ethically & effectively?

Who will be responsible for this oversight? (assign individuals)

Question 6
How will we measure the effectiveness of this AI tool?

List all metrics.

Assign who will be responsible for collecting each metric.

LEVEL 3 DEEP DIVE

Work through the prompts if you checked boxes C, D and/ or E in the Quick Start Checklist on Page 2.

Level 3 summary

This evaluation level is for high-impact applications using sensitive data or significantly altering core processes (e.g. creating program initiatives using org data, grant writing, donor communications, etc.)

Process

Lead a thorough review involving leadership, potentially external experts, & key stakeholders. Use a combination of the below prompts and questions to work through the process.

Deep Dive Overview

Use this guide to get your team thinking and chatting about the AI-enabled technologies you might want to use. Think of these as conversation starters—they cover a range of considerations about how AI could affect your work and what good practices look like.

Don't worry, this isn't a test! This is about finding what works for you and your team. Feel free to adapt the questions or prioritize the ones that make sense for your organization's goals.

Stay Grounded in Purpose & Values

Understand your 'why?'

Before evaluating the features and functionality of specific AI-enabled technologies, keep mission & purpose top-of-mind.

- How does the proposed AI-enabled solution align with our organization's mission and core values?
- What are the use-cases that we think can be addressed with this AI-enabled technology?
- Are there any downsides to adopting an AI-enabled solution for this use-case? (ethics, bias, environmental impact, etc.)
- If AI wasn't an option, how would we address this need?
 - How does this AI solution compare to non-AI alternatives?
- What's not working about our current approach?
- What new data collection or analysis capabilities would an AI solution provide us?
- If we adopt this AI solution, how will we measure its impact on our ability to fulfill our mission?

Pursue Strategic Priorities

Remain proactive

AI can be most helpful if it's used with a strategic purpose in mind. For example, saving time from administrative tasks may free up team members to focus on core initiatives.

- How would this support our strategic priorities?
- Which of our current strategic goals could benefit most from an AI-enabled solution?
- What would we not be doing or need to set aside in order to pursue an AI-enabled solution?

Engage Stakeholders

Consider key perspectives

Your organization has a range of stakeholders who play a role in supporting and benefiting from the mission. Consider the voices that are important to engage in this decision.

- How would the use of AI benefit our stakeholders?
- What concerns might our stakeholders have about us adopting AI, and how can we address them?
- Are there others who we need to engage with before making this decision?
 - How can we involve key stakeholders in the decision-making process?
- What would we need to do to support our team to use this AI-enabled technology responsibly and effectively?
- What are the team-level benefits for using this tool?
- What steps can we take to maintain stakeholder trust as we integrate AI?

Review Current Data Practices

Consider how data is or isn't used

AI is powerful because of how effectively it can create outputs using data. If you're planning to share your organization's data with AI, review your practices to ensure security and compliance with data policies.

- What information would we need to share to address our use-case?
- Will we be sharing any sensitive data?
- What security and compliance practices do we have in place for our data?
- Have our data policies been updated with AI technologies in mind?
- What safeguards can we put in place to maintain the "human touch" when using data?

Assess Risk

Address unintended consequences

Recognizing and assessing risk before adopting a new AI solution can save you from having to respond to issues down the road.

- Could this AI solution inadvertently discriminate against or exclude any groups we serve?
 - How can we test for this?
- How might this AI solution affect the privacy of our beneficiaries, donors, or staff?
- Is there a risk of becoming overly dependent on the AI solution or the company providing it?
- How transparent can we be about our use of AI? Are we comfortable explaining its role to our stakeholders?
- Could this AI solution be misused or repurposed in ways that go against our mission? How can we prevent this?
- How might this AI solution affect jobs within our organization or the communities we serve?
- Are there any legal or regulatory considerations we need to be aware of when implementing this AI solution?