

AI Impact Maine — ai-policy-template (preview)

AI POLICY TEMPLATE FOR SMALL ORGANIZATIONS

Sample Preview Version

△ **WATERMARK NOTE:** This is the sample preview version. The full version includes complete policy templates, approval forms, implementation guides, and customizable language ready to deploy.

Document Type: Sample AI Governance Policy Preview

Audience: Small businesses, nonprofits, municipalities

Read Time: 8 minutes

🔍 WHAT'S IN THIS SAMPLE

Included in this preview: - Executive summary - Why your organization needs an AI policy - Key policy concepts explained - Sample tool classifications - Essential “what NOT to do” guidelines - One sample policy template section - “What’s Included in Full Version” section

NOT included in this preview: - Complete policy template (ready to customize) - All approval forms and processes - Full tool evaluation frameworks - Implementation roadmap and timeline - Policy appendices and checklists - Training materials - Governance structure guidance

INTRODUCTION: WHY YOU NEED AN AI POLICY

The challenge: Your organization is probably already using AI—ChatGPT, Copilot, image generators, automation tools. But without clear guidelines, you face real risks:

- **Data security:** An employee accidentally shares customer information with ChatGPT
- **Compliance violation:** Your nonprofit unknowingly violates donor privacy requirements
- **Reputation:** Public backlash from irresponsible AI use
- **IP theft:** Proprietary business information used to train AI models
- **Inconsistency:** No clear standards for who uses what

The solution: A simple, practical AI policy that:

Allows safe, productive AI use
Protects organizational data

Ensures regulatory compliance
Provides clear employee guidelines
Establishes governance process

How long does this take? Most small organizations can implement in 4-6 weeks.

QUICK POLICY OVERVIEW

The Core Principle

“Use AI tools strategically to enhance our work, while protecting our data, our customers’ privacy, and our reputation.”

Three Simple Rules

Rule 1: Don’t Share Sensitive Data - Never share customer names/data - Never share financial information - Never share health or personal information - Never share passwords or credentials

Rule 2: Use Only Approved Tools - Free tier: ChatGPT, Claude, Google Gemini - ⚠️ Ask permission first: Image generators, specialized tools - No random unvetted tools

Rule 3: Review Everything AI Creates - Check accuracy before using - Verify citations and facts - Label AI-generated content - Add human judgment and expertise

TOOL CLASSIFICATION QUICK GUIDE

GREEN LIGHT: Use Freely (with data care)

These tools are generally safe. Just follow Rule 1 (no sensitive data):

Tool

ChatGPT

Claude

Google Gemini

Grammarly

Perplexity AI

How to use: Employee can use without approval. Just complete training.

YELLOW LIGHT: Ask Permission First

These tools need manager approval due to data or compliance concerns:

Tool

DALL-E, Midjourney
Industry-specific tools
Tools processing health/finance data

How to use: Get your manager's approval + compliance check using the form in the full version.

RED LIGHT: Don't Use

Unknown or unlisted tools
Tools with no privacy policy
Tools that claim to train on your data

THE ESSENTIAL DATA SECURITY RULE

What You MUST NEVER Share with Any AI Tool

Personal Information (PII) - Names tied to any sensitive data - Social Security Numbers - Driver's license numbers - Passport numbers

Financial Information - Bank account numbers - Credit card numbers - Tax returns - Financial records

Health Information - Patient/client health records - Mental health information - Medical diagnoses - Prescription information

Customer/Donor Data (names + details) - Customer lists - Donor information - Subscriber records - Client details with sensitive info

Credentials & Secrets - Passwords - API keys - Database credentials - Private keys

HOW TO WORK WITH SENSITIVE DATA SAFELY

If you have sensitive data but need AI help, here are three options:

Option 1: Anonymize First Recommended

Remove identifying information before using AI:

Bad: "Customer Jennifer Smith from Portland, age 34, diagnosed with diabetes, annual spending \$2,000"

Good: "Customer from Maine region, spending \$2,000-3,000 annually, health-conscious segment"

Option 2: Use Only Blanked Data

Remove the sensitive piece entirely:

Bad: Survey results broken down by age, race, and health status

Good: Overall survey insights without demographic breakdowns

Option 3: Get Approval

For critical business needs, your manager + compliance officer can approve case-by-case use.

SAMPLE POLICY SECTION

SAMPLE: Employee Guidelines for Content Creation

When creating content with AI:

DO: - Use AI to draft, outline, and brainstorm - Review all AI outputs carefully - Verify facts and citations - Add your own expertise and perspective - Disclose AI assistance when appropriate - Label AI-generated content

DON'T: - Copy AI output directly without review - Share customer or confidential data - Present AI work as entirely human - Trust AI facts without verification - Use prohibited tools - Ignore grammar/accuracy issues

Example workflow: 1. Use ChatGPT to brainstorm blog post ideas 2. Create your outline (with AI help) 3. Write sections, using AI to draft some paragraphs 4. Carefully review and edit everything 5. Check all facts are accurate 6. Disclose: "This post was drafted with AI assistance and reviewed by our team"

SAMPLE APPROVAL FORM

To request use of a restricted tool, submit this to your manager:

TOOL APPROVAL REQUEST

Tool Name: _____

What will you use it for?

What data will you access?

- Public data
- Internal data
- Confidential data

Sensitive data (PII/health/financial)

Have you reviewed the vendor's privacy policy?

Yes No

Manager Approval: _____ Date: _____

Compliance Review (if sensitive data):

Approved Denied

Reason: _____

WHAT'S INCLUDED IN THE FULL VERSION

Templates & Forms

- Complete customizable AI policy (8-10 pages)
- Approved tools list (pre-populated, editable)
- Tool evaluation framework
- Approval request form
- Tool inventory tracking sheet
- Approval log template
- Incident reporting form

Implementation Guides

- 4-phase implementation roadmap (Preparation – Implementation)
- Change management communication templates
- Staff training outline
- FAQ document
- All-staff announcement template
- Manager guidance guide

Detailed Policies

- Governance structure and decision-making process
- Complete incident response procedures
- Disciplinary guidelines
- Data breach response protocol
- Quarterly audit procedures

Support Materials

- One-page policy summary (share with staff)
- Tool comparison matrix
- Role-specific guidelines (for different departments)
- Customer/donor communication templates
- Customization instructions

All provided as editable Word documents ready to customize for your organization.

NEXT STEPS

To Get Started Today

1. **Share this preview** with your leadership team
2. **Discuss AI challenges** you're currently facing
3. **Request the full version** at [Call-to-Action]

What Happens Next

When you request the full version, you'll receive:

Complete policy template (ready to customize)
All forms and checklists
Implementation timeline
Optional: 30-minute consultation to customize for your org

Implementation Timeline

Once you have the full version: - Week 1-2: Customize for your organization - Week 3-4: Train staff and launch - Week 5-8: Monitor and optimize

WHAT MAKES THIS POLICY SPECIAL

Specifically designed for small organizations - Not overly complex or bureaucratic - Practical, implementable guidance - Common sense approach - Easy to enforce

Focuses on real risks - Data security and privacy - Compliance and regulations - Reputation and stakeholder trust - Practical employee scenarios

Actionable and customizable - All templates are ready to use - Can be implemented in 4-6 weeks - Adaptable to your organization size/type - No legal expertise required*

*Review with your legal counsel before adopting

FREQUENTLY ASKED QUESTIONS

Q: Is this policy legally sufficient? A: This is a well-researched template, but consult your legal counsel before adoption to ensure compliance with your specific regulations.

Q: Can we customize this for our organization? A: Yes! The full version includes customization instructions and all editable templates.

Q: How often should we update this policy? A: Review annually, or whenever new tools become popular or regulations change.

Q: What if employees don't follow it? A: The full version includes discipline guidelines and incident response procedures.

Q: Does this restrict innovation? A: No—it enables safe innovation by approving new tools through a simple process.

ABOUT AI IMPACT MAINE

AI Impact Maine helps Maine organizations (small businesses, nonprofits, municipalities, educators) adopt AI responsibly, strategically, and effectively.

We provide: - AI strategy consulting - Policy development and implementation - Staff training and education - Risk assessments and governance - Tool evaluation and selection

Let's talk about your AI strategy.

[Call to Action: Schedule Consultation]

Ready for the Full Version?

The complete policy template includes everything you need to implement AI governance at your organization:

- 30+ pages of templates, forms, and guidance
- All ready to customize
- 4-phase implementation roadmap
- Training materials included

Get immediate access: - [Download Button: Get Full Policy Template] - [Schedule a consultation with our team]

Questions? Email us or call [Contact Info]

This is a sample preview. The full professional version is available for download.

WATERMARK & DESIGN NOTES

For PDF Version: - Place diagonal watermark “AI Impact Maine – Sample Preview” on pages 2-5 - Opacity: 12% (visible but not obstructive) - Header: Logo + “AI Impact Maine | AI Policy Template” - Footer: “aiimpactmaine.com | Sample Preview – Download Full

Version” - Color callout boxes: Key principles and rules - Button colors: CTA button in primary brand color

When Creating Full Version: - Remove this watermark - Add company name in header - Customize logo placement - Update contact information - Keep same accessible design