

Artificial Intelligence (AI) Use Policy

Purpose: At the Hendricks County Community Foundation (HCCF), our work is grounded in relationships, trust, and stewardship of resources on behalf of our community. We recognize that artificial intelligence (AI) tools can enhance our effectiveness by improving efficiency, supporting creativity, and strengthening learning and planning across the organization. This policy provides guidance for the responsible, ethical, and mission-aligned use of AI at HCCF.

For purposes of this policy, “artificial intelligence” or “AI” refers to any computer system, software, algorithm, or technology that uses machine learning, natural language processing, or similar techniques to perform tasks that typically require human intelligence, including learning, reasoning, data analysis, problem-solving, and language or visual content generation.

AI is a tool to support our mission. It does not replace the human judgment, relationships, and accountability that define community philanthropy. HCCF recognizes that AI use may introduce legal, ethical, operational, reputational, and data security risks. This policy is intended to mitigate those risks through clear standards, human oversight, and alignment with HCCF’s mission and values.

AI can help HCCF work more efficiently and thoughtfully, but it will never replace the people who make community philanthropy meaningful. By approaching AI with care, transparency, and strong governance, HCCF ensures that technology strengthens—rather than diminishes—our commitment to donors, nonprofits, and the Hendricks County community.

Goals: HCCF adopts this policy to:

- Use AI to strengthen learning, planning, communications, and internal operations.
- Streamline administrative and routine tasks so staff can focus on donors, nonprofits, volunteers, and community impact.
- Enhance efficiency and creativity while maintaining accuracy, inclusivity, and alignment with HCCF’s mission, values, and voice.
- Protect donor privacy and uphold public trust.

Appropriate Uses of AI: AI tools may be used by HCCF personnel to support internal work, provided all outputs are reviewed and approved by appropriate staff prior to use. Appropriate uses include:

- Drafting or editing internal and external communications, presentations, and outreach materials, with human review for accuracy, tone, and mission alignment.
- Brainstorming ideas for campaigns, donor education, community initiatives, grantmaking themes, and educational programming.
- Summarizing reports, meeting notes, or publicly available data for internal planning purposes.

- Supporting research and planning efforts, provided that staff independently verify factual accuracy and do not rely on AI as the sole source for data, legal, regulatory, or compliance information.

All AI-assisted content remains the responsibility of the staff member using the tool and must meet HCCF standards for quality, accuracy, professionalism, and record retention.

Prohibited Uses of AI: To protect trust, privacy, and sound governance, AI may not be used for the following:

- Entering, uploading, or processing donor information, including names, contact details, giving history, beneficiary designations, or any personally identifiable information (PII), in unauthorized public or general-purpose third-party AI tools not expressly approved by HCCF.
- Making or automating decisions related to grantmaking, stewardship, donor advising, fund administration, or financial management. These activities require human judgment, context, and values-based evaluation.
- Allowing AI tools to access HCCF's internal databases, financial systems, or confidential records.
- Generating final content that is distributed externally without human review and approval.

Core Commitments:

- **People First:** Relationships are central to philanthropy. AI will be used only to support staff and volunteers, never to replace human connection, discretion, or accountability.
- **Privacy and Data Protection:** HCCF personnel may not input, upload, or provide to any AI tool any confidential or sensitive information, including donor data, financial account information, protected health information, or other data protected under applicable federal or state law. Only AI platforms expressly approved by HCCF leadership may be used.
- **Use of AI Within Fundraising and Management Systems:** HCCF may use AI-enabled features embedded within approved fundraising, donor management, and productivity systems, including tools that support prospect research, segmentation, forecasting, or workflow optimization, provided such tools operate under secure contractual terms. These features may inform staff understanding and planning but may not replace human judgment, relationship-based decision-making, or values-driven engagement. AI-generated insights, scores, or predictions must be used as one input among many and should never be the sole basis for donor prioritization, stewardship strategies, grantmaking decisions, or resource allocation.
- **Accuracy and Integrity:** All AI-generated or AI-assisted content must be reviewed, verified, and approved by staff before use. Personnel remain fully responsible and accountable for any content produced with AI assistance. AI is a drafting and research aid, not a decision-maker.
- **Equity and Inclusion:** HCCF is committed to equity and inclusion in all aspects of its work. Staff must review AI-generated content for fairness, inclusivity, and respect for all individuals and communities. Any content that appears biased, discriminatory, or inconsistent with HCCF values must be revised or rejected.
- **Continuous Learning and Oversight:** AI technologies and best practices are evolving. HCCF leadership is responsible for oversight of AI use and governance and will monitor developments in AI, applicable law, and best practices. This policy will be reviewed at least annually and updated as needed.

Approved AI Platforms: Only AI tools approved by HCCF leadership may be used for organizational work. Approved platforms may include, but are not limited to:

- Grammar and writing-assistance tools
- Meeting and video conferencing AI summaries and transcription tools

- Secure, organization-approved generative AI platforms
- Secure wealth screening and donor research tools used under contractual agreement (e.g., DonorSearch and similar nonprofit prospect research services)
- AI features embedded within approved productivity software

A current list of approved platforms will be maintained internally. Use of non-approved AI tools for HCCF business may result in corrective action.

Scope and Applicability: This policy applies to all HCCF employees, contractors, consultants, interns, volunteers, and Board members who use artificial intelligence tools in connection with HCCF work or on behalf of HCCF. Contractors and consultants working for HCCF are expected to comply with this policy and applicable contractual requirements related to confidentiality, data security, and use of technology.

Human Oversight and Escalation: If any AI-generated content, analysis, or output raises concerns related to accuracy, bias, privacy, ethics, legal compliance, or reputational risk, personnel must pause use of the material and consult with their supervisor or senior leadership before proceeding. When appropriate, leadership may seek legal, ethical, or technical guidance.

Transparency: Routine use of AI as a drafting, editing, or internal support tool does not require external disclosure. However, HCCF may disclose the use of AI when such use is material to understanding the content, analysis, or methodology being shared, or when transparency is necessary to maintain public trust. Significant AI use in major reports or planning materials should be disclosed internally to appropriate leadership.

Intellectual Property and Ownership: All materials, content, analyses, or work products created with the assistance of AI tools in the course of HCCF work are the property of the Hendricks County Community Foundation, regardless of the extent of AI involvement or whether the work was performed by employees or external contractors.

Training and Staff Readiness: HCCF is committed to supporting responsible and informed use of AI. HCCF may provide periodic guidance, training, or resources, including onboarding orientation as appropriate, to ensure personnel understand acceptable use, risks, and best practices related to AI technologies.

Policy Review: HCCF recognizes that artificial intelligence technologies, regulations, and best practices are evolving rapidly. This policy will be reviewed at least annually by HCCF leadership and the Governance Committee to ensure continued alignment with legal requirements, sector best practices, and the Foundation's mission and values. HCCF will also monitor developments in nonprofit and community foundation practice related to AI governance. Updates may be made as needed to address emerging risks, technological developments, and organizational experience with AI tools.