

The Jonesi Consultancy | Houston, TX

EXECUTIVE AI ADOPTION · POLICY TEMPLATE

AI USE POLICY STARTER KIT



A Fill-in-the-Blank Template for Organizations That Need One
Now

*10 sections, suggested language, and the decisions only your
leadership can make.*

YOUR PEOPLE ARE ALREADY USING AI

Most organizations discover this after the fact, usually when something ends up somewhere it should not have. A written policy is the cheapest control you can put in place, and it is the one thing employees consistently ask for and rarely receive. This kit gives you the structure and suggested wording for a workable internal AI use policy. Every bracketed field is a decision your leadership needs to make. Nothing here is difficult. It is simply work that keeps getting postponed.

1 How to Use This Kit

- 1 Read all ten sections before writing anything. Several decisions depend on each other.
- 2 Fill the bracketed fields with a small group: one executive sponsor, one operations lead, one person from IT or security, and one frontline manager.
- 3 Delete what does not apply. A short policy people read beats a thorough one they ignore.
- 4 Have counsel review the draft before it is published, particularly the data, disclosure, and client-confidentiality sections.
- 5 Publish it, walk your teams through it, and put a review date on the calendar before you move on.

WHAT THIS TEMPLATE IS NOT

This is a starting structure, not legal advice, and it is not tailored to your industry, your contracts, or your regulatory obligations. Organizations in healthcare, financial services, education, and government work carry requirements this document does not attempt to address. Have qualified counsel review your final policy before you publish it.

WHO SHOULD BE IN THE ROOM

One executive sponsor, one operations lead, one person from IT or security, and one frontline manager. Include the last one and the policy survives contact with reality.

2 Purpose and Scope

Say plainly why the policy exists and who it covers. Policies that open with a threat get read as a threat. Policies that open with a purpose get read as guidance.

SUGGESTED LANGUAGE

[ORGANIZATION NAME] supports the responsible use of artificial intelligence tools to improve the quality and efficiency of our work. This policy explains which tools are approved, what information may and may not be used with them, and what each of us is responsible for when AI assists our work.

This policy applies to [ALL EMPLOYEES / EMPLOYEES, CONTRACTORS, VOLUNTEERS, AND BOARD MEMBERS] and covers any use of AI tools for [ORGANIZATION NAME] business, whether on organization-owned or personal devices.

DECISIONS TO MAKE

- › Does this cover contractors, volunteers, interns, and board members, or employees only?
- › Does it cover personal devices and personal accounts used for work?
- › Who owns this policy by name, and who approves exceptions to it?

Policy owner (name and title): _____ Effective date: _____

3 Approved Tools

Name the tools people may use. An approval list is the single most useful thing in an AI policy, because the alternative is everyone quietly choosing their own.

SUGGESTED LANGUAGE

Employees may use the AI tools listed below for the purposes described. Using any other AI tool for [ORGANIZATION NAME] work requires written approval from [ROLE], which exists so that we can review the tool's data handling before organizational information reaches it. Requests for new tools should go to [ROLE OR EMAIL]. We expect this list to grow.

TOOL	APPROVED FOR	NOT APPROVED FOR	ACCOUNT TYPE

What May and May Not Be Entered

This is the section that prevents the incident. Be concrete. Categories like “sensitive information” get interpreted generously by people in a hurry. Adjust the examples to match your organization. The three-tier structure works because it tells people what is allowed, not only what is forbidden.

NEVER ENTER

Client or customer records, personal information about identifiable individuals, health information, financial account details, employee records, credentials and passwords, unpublished financial results, anything covered by a confidentiality agreement, [\[ADD YOUR OWN\]](#).

APPROVED TOOLS ONLY

Internal drafts, meeting notes, non-public project material, vendor communications, [\[ADD YOUR OWN\]](#). These may be used only in tools on the approved list under an organizational account.

GENERALLY FINE

Published material, public research, general questions, anonymized or invented examples, your own writing that contains no confidential detail, [\[ADD YOUR OWN\]](#).

SUGGESTED LANGUAGE

If you are unsure which category information falls into, treat it as the more restrictive one and ask [\[ROLE\]](#) before proceeding. Nobody has ever been disciplined here for asking.

WHY THE THIRD TIER MATTERS

A policy that lists only what is forbidden leaves careful employees assuming everything is, which is how your most conscientious staff become your least engaged. Naming what is explicitly fine costs you nothing and gives cautious people somewhere to stand.

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Human Review and Accountability

The person who sends the work owns the work. State it once, in plain language, and the rest of the policy gets easier.

SUGGESTED LANGUAGE

AI assists our work. It does not approve our work. Every employee remains fully accountable for anything they produce with AI assistance, exactly as they would be for work produced any other way.

Before AI-assisted output is sent to a client, a funder, a board, a regulator, or any public channel, the responsible employee must verify factual claims and figures against a reliable source, confirm that citations, quotations, names, and dates are real, check that the reasoning holds, and confirm the content reflects our actual situation rather than a generic answer.

DECISIONS TO MAKE

- › Which categories of work require a second reviewer before release?
- › Is there any output that must never be AI-assisted at all, such as disciplinary documentation, clinical notes, or legal filings?

Work that requires a second reviewer: _____

Work that may not be AI-assisted: _____

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Disclosure

Decide when AI involvement gets disclosed, to whom, and in what words. Ambiguity here is what makes people hide their usage, which is the outcome you least want.

SUGGESTED LANGUAGE

We disclose AI involvement where a reasonable person would expect to know. Disclosure is required for **[EXTERNAL PUBLICATIONS / CLIENT DELIVERABLES / GRANT SUBMISSIONS / IMAGES AND LIKENESSES / ADD YOUR OWN]**.

Disclosure is not required for routine internal assistance such as drafting, summarizing, formatting, or research support, provided the output has been reviewed by the responsible employee. Where disclosure is required, use this wording: **[STANDARD DISCLOSURE SENTENCE]**.

DECISIONS TO MAKE

- › Do any client contracts or funder agreements already say something about AI use? Check before writing this section.
- › Who decides borderline cases, and how quickly can they answer?

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Prohibited Uses

Keep this list short and absolute. Long prohibition lists read as distrust and get skimmed.

SUGGESTED LANGUAGE – PROHIBITED REGARDLESS OF TOOL OR CIRCUMSTANCE

- › Entering information listed as “never enter” in Section 4 into any AI tool.
- › Presenting AI output as verified fact without checking it.
- › Using AI to generate content that impersonates a real person, including their voice, likeness, or signature.
- › Using AI to make or appear to make final decisions about hiring, discipline, termination, compensation, or [ADD YOUR OWN], without documented human judgment.
- › Using unapproved tools for organizational work.
- › [ADD YOUR OWN].

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Roles and Responsibilities

Policies without named owners do not survive their first quarter. Assign each role to a person, not a department.

ROLE	RESPONSIBILITY
EVERY EMPLOYEE	Follow this policy, verify AI-assisted work before it leaves your hands, and ask when a situation is not covered here.
MANAGERS	Make expectations clear within your team, model verified use, and raise gaps in this policy rather than working around them.
POLICY OWNER [NAME] _____	Maintain this document, approve new tools, answer borderline questions, and run the scheduled review.
IT OR SECURITY [NAME] _____	Review the data handling and account configuration of any tool before it is approved.
EXECUTIVE SPONSOR [NAME] _____	Own the organizational position on AI, resolve escalations, and fund the training this policy assumes.

When Something Goes Wrong

Assume a mistake will happen. What matters is whether people report it quickly or hide it. Write this section so that reporting is obviously the safer choice.

SUGGESTED LANGUAGE

If confidential information is entered into an AI tool in error, if inaccurate AI-assisted content reaches a client or the public, or if you suspect a tool is handling our data improperly, report it to **[ROLE OR EMAIL]** within **[TIMEFRAME]**.

Reporting a mistake in good faith will not result in disciplinary action. Concealing one may. Our ability to contain a problem depends entirely on how quickly we learn about it.

Report incidents to: _____ Required timeframe: _____

Training and Onboarding

SUGGESTED LANGUAGE

A policy assumes a level of understanding people may not have yet. All **[EMPLOYEES / STAFF IN THESE ROLES]** will complete AI use training covering this policy, safe handling of information, and verification practice by **[DATE]**. New hires will complete it within **[TIMEFRAME]** of their start date.

Review, Version Control, Acknowledgment

SUGGESTED LANGUAGE

AI tools change faster than most policies. This policy will be reviewed **[QUARTERLY / SEMI-ANNUALLY / ANNUALLY]** by **[ROLE]**, and sooner if our tools, our obligations, or the technology change materially. All personnel covered by this policy will acknowledge that they have read and understood it.

VERSION	DATE	SUMMARY OF CHANGES	APPROVED BY

A

Appendix A: Employee Acknowledgment

Adapt this page to your own HR practice. Keep it to one page and keep the language plain.

ACKNOWLEDGMENT

I have read the **[ORGANIZATION NAME]** AI Use Policy. I understand which tools are approved, what information I may and may not enter into them, and that I remain responsible for verifying any work I produce with AI assistance before it leaves my hands.

I understand that if I make a mistake, reporting it promptly is expected and will not be held against me.

NAME (PRINTED): _____

SIGNATURE: _____

DATE: _____

BEFORE YOU CIRCULATE THIS

An acknowledgment records that someone read the policy. It does not record that they understood it. Walk your teams through the document in person, then collect the signatures.

B

Appendix B: The 60-Second Check Before You Send

Print this one and put it where people can see it. It is the practical half of Section 4, and it is the habit that keeps the policy from being theoretical.

✓	STEP	ASK YOURSELF
☐	CLAIMS	What factual claims does this make? List them before you defend them.
☐	HALLUCINATIONS	Could the tool have invented any citation, statistic, quotation, name, or date? Check the ones that matter.
☐	ERRORS IN REASONING	Does the logic actually hold, or does it only sound like it does?
☐	CONTEXT	Did the tool have what it needed, or is this generic where it should be specific to us?
☐	KNOWLEDGE GAPS	Is this time-sensitive, proprietary, or particular to our industry in a way the tool could not know?

THE CHECK METHOD

A widely used verification mnemonic that we teach and apply as part of our AI integration practice. It takes under a minute once it becomes habit, and it is the single highest-return behavior in everyday AI use.

WHAT A POLICY CAN AND CANNOT DO

A written policy sets boundaries. It does not build capability, and it will not by itself change how anyone works. Organizations that publish a policy and stop there usually find that behavior barely moves, because people follow rules they understand and ignore rules they do not.

The policy is worth far more once your teams have been trained to work within it.

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