

From Curiosity to Policy

Two hours to build a first-draft, board-ready AI policy for your foundation or the families you advise.

Thursday, October 22, 2026 2:00 to 4:00 PM ET Live on Zoom

Most foundations already use AI. Very few have written down the rules.

Almost two-thirds of foundations and nonprofits report using AI, yet 98% of foundations have no policy on whether grantees may use it.¹ Courts judge board decisions by the process behind them, so a written policy is the evidence that trustees acted with care. This session turns that principle into language a board can vote on.

FIVE BUILDING BLOCKS, DRAFTED STEP BY STEP

1 Acceptable use

2 Data limits

3 Accountability

4 Transparency

5 Vendor requirements

WHAT YOU'LL LEAVE WITH

- ☐ **A first-draft AI policy** built on a 12-section template, with your own language in the sections that carry the most risk
- ☐ **A risk-tier guide** separating everyday drafting from grant decisions AI should never make
- ☐ **A data rule** you can adopt the same day: what never goes into an unapproved tool
- ☐ **Three non-negotiable vendor terms** and a contract checklist for every AI purchase
- ☐ **A 90-day path to board adoption**, from interim rule to a fixed review date

HOW THE SESSION WORKS

This is a working session, not a lecture. For each building block, we cover the rule and why it matters to a fiduciary, then you draft it live using guided sentence starters.

Come with one foundation in mind: your own, or a client's.

WHO SHOULD JOIN

Donor advisors, members of family foundations and their boards, and individual donors who want AI governance that holds up to scrutiny.

Leslie Gross Founder, Advantage Insights. Former Chief Oversight Counsel to Senate Majority Leader Harry Reid and former Deputy Assistant Secretary for Legislative Affairs at the U.S. Department of Homeland Security.

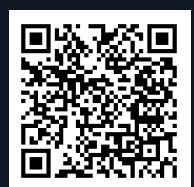
Reserve your place

Thursday, October 22, 2:00 to 4:00 PM ET, on Zoom. Register to receive your personal join link by email. Live only; not recorded.

Register on Zoom

Add to calendar

us06web.zoom.us/meeting/register/R6NrxWTdT4m5sj2TTDHDHg



SCAN TO REGISTER

¹ Center for Effective Philanthropy, *AI With Purpose* (2025), surveys of foundation and nonprofit leaders, April to May 2025. This session provides educational policy information, not legal advice, and does not create an attorney-client relationship. Confirm any policy with qualified counsel before board adoption. Advantage Insights · Navigate Complexity. Manage Risk. Maximize Impact.