

FREE WORKSHEET · NONPROFITS

DIGIVINO

The AI Integration and Control Matrix

Use AI to save staff time, and keep a person in charge of everything donors see. About 10 minutes.

3 questions | 1 worksheet | About 10 minutes | For executive directors and boards

> AI can write a donor thank-you note in seconds. It can also tell a donor that a gift is tax-deductible when it isn't, in your organization's name. This worksheet helps you decide where AI can help and where a person must check its work.

1 Two ways to use AI

AI AS AN ASSISTANT

AI writes a draft. A person decides.

- Staff review everything before it goes out
- Nothing reaches a donor until someone reads it and chooses to send it
- Examples: drafting thank-you letters, summarizing grant reports

AI ON ITS OWN

AI acts. A person checks later, maybe.

- Staff check after the fact, if at all
- The chatbot replies, the email sends or the record changes with no one reviewing it first
- Example: a website chatbot answering donors' questions live

> **Watch out for this:** when a tool is right most of the time, busy people check it less, and then stop checking. Experts call this automation complacency. It happens slowly, and no one decides it.

2 The three-question test

Ask these about every AI tool before it touches anything donors, funders or the public will see.

1 Who has the final say?
Can the tool publish, send or change records by itself? Or does a named person approve everything it produces?

2 How fast does it act?
If it acts before anyone has time to read it, like a live chat reply or an automatic email, treat it as AI on its own.

3 What if it gets something wrong?
Think of the worst likely mistake. Who would see it? Could it cause a legal, money or reputation problem?

3 Four rules to keep a person in charge

Name one person per tool
One named person is responsible for what each AI tool produces.

Check regularly
Keep checking, even when a tool has been right for months.

Keep sensitive questions human
Questions about money, taxes, eligibility or safety always go to a person.

Review every year
Go over this worksheet with your board each year, and when a vendor adds a new AI feature.

digivino.com · Info@DigiVino.com · (423) 415-1368

4 How to read your answers

IF THE WORST MISTAKE WOULD BE…	USE AI…	EXAMPLE
Seen only by staff, and easy to fix	As an assistant or on its own, your choice	Summarizing meeting notes for staff
Public, but a person reads it before it goes out	As an assistant: a person edits and sends	Donor emails and newsletters
Public and instant, or about money, taxes, eligibility or safety	Only as an assistant, or not at all	A chatbot answering “Is my gift tax-deductible?”

5 Your worksheet

List every AI tool you use or are thinking about, including AI features turned on inside software you already use.

TOOL AND TASK	1 FINAL SAY	2 SPEED	3 WORST MISTAKE	DECISION
Example: email software drafts thank-you notes	Staff approve each one	Waits for approval	Wrong donor name or amount	Assistant only. Keep the approval step.

What to do next

Fill in one row today
Start with the AI tool closest to your donors. That’s usually email or a website chat.

Book a complimentary 15-minute call
Go to digivino.com/book and bring this worksheet. We build AI tools for nonprofits with a person’s review built in.

Run the free AI Visibility Check
Go to digivino.com/ai-visibility-check. See what ChatGPT, Gemini and Perplexity tell donors and funders about you.