

Establishing Your Own AI Policy and Protocols

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Why Establish an AI Policy?



Guardrails

Clear boundaries
on appropriate
use



Values

Decisions
grounded in our
mission



Culture

Shared
expectations
across the team



Innovation

Room to
experiment
responsibly

Primary Forms of AI

Generative AI

Creates new content—text, images, audio, code, video. Rather than just classifying or scoring existing data, it produces outputs that didn't exist before.

Agentic/Autonomous AI Systems

Can pursue goals by taking actions over multiple steps with limited human intervention—planning, using tools, calling other software, and adjusting based on results.

Workshop Overview

1

Data Protection & Tool Governance

Safeguarding sensitive information and choosing the right tools for your organization

2

Human Oversight & Creative Integrity

Keeping people in control and protecting artistic vision and authenticity

3

Protocols & Policy Launch

Translating principles into actionable guidelines and rolling out your policy

Part 1: Data Protection and Tool Governance

Discovery Process

- » What is the comfort level of your staff, musicians, board, and volunteers with AI? What are their concerns?
- » What new AI tools are already being used in your organization?
- » Which of your existing tools have integrated AI into their product?
- » What level of data risk are you comfortable with?
- » Where do you see innovation opportunities using AI?

Data Sensitivity

TIER 1

Lower Risk

- Brand guidelines
- Templates
- Boilerplates
- Public information from your website

Highest benefit-to-risk ratio

TIER 2

Caution

- Patron, donor, member data
- Ticket history
- Survey responses
- Planning documents

Enterprise tools only, clear purpose required

TIER 3

Restricted

- Health records
- SSNs
- Credit card data
- Youth data
- CBA-restricted information

Keep out of AI entirely

Part 1 Table Discussion (15 mins)

- » What AI tools are you currently using?
- » What data does your organization currently use with AI tools—and do you know which tier it falls into?
- » Are staff using personal or free AI accounts? How would you know?
- » What one governance step could you implement in the next 30 days?

Part 2: Human Oversight and Creative Integrity

Role of AI vs. People

Artistic Decisions

AI may inform—but never make—choices about programming, repertoire, or creative direction.

Donor & Audience Relationships

Cultivation, stewardship, and sensitive communications require human judgment and personal connection.

Public-Facing Content

Every AI-assisted draft must be reviewed for tone, accuracy, and voice before release.

Known AI Limitations

Sycophancy, hallucination, bias, and overconfidence
demand critical review

AI output is a **starting point**, not a final product

AI in Practice: A Real -World Example

- » Used AI to analyze anonymized sales velocity by section and map historical data to model price elasticity and breakeven thresholds
- » The analysis gave us the confidence to increase ticket prices with evidence, not instinct
- » Key factor: the underlying data was clean, the task was well-defined, and a human interpreted and acted on the output
- » AI did in hours what would have taken weeks or wouldn't have happened at all

Setting Realistic Expectations

- » First-pass AI output is rarely usable as-is; plan for revision, then review
- » The more complex or nuanced the task, the more errors compound
- » This isn't a reason to avoid AI, it's a reason to build realistic expectations into your workflow from the start
- » Think of AI as a capable but inexperienced collaborator: it needs direction, correction, and a human with enough expertise to **catch what it gets wrong**

Keeping People Engaged

Ownership

Deciding who owns the process and how to roll out

Collaboration

Forming a committee: who should be in the room?

Dialogue

Talking to your staff and stakeholders about your planned use of AI

Oversight

Establishing oversight and governance

Part 2 Table Discussion (15 mins)

- » How could AI expand your organization's capabilities?
- » Where in your organization's existing work could AI create efficiencies? Where is the human touch most essential?
- » How would you handle a situation where AI-generated content went out without adequate review?
- » What would your musicians, artists, or board members want to know about how you use AI?

Part 3: Defining Protocols and Launching a Policy

Translating Values into Protocols

Define Opportunities & Risks

Identify AI opportunities and risks for your organization based on the discovery process

Align with Values

Align guidelines with organizational values and culture

Research Tools & Use Cases

Research tools and use cases that fit your needs

Training & Periodic Review

Identify training and establish a process for periodic review

Training & Ongoing Review

- » AI's uses are limitless – and so are its risks
- » Training on tools *and* policy is crucial
- » This is not a policy that can be done once – AI is moving fast and you'll have to as well
- » Guidelines vs hard set policies

Examples of AI Policy Sections



AI Definitions
and Scope



Staff, Board, and
Musician
Expectations



Allowed vs.
Prohibited Use
Cases



Training
Requirements



Approved List of
Tools



Governance and
Oversight

Steps to Develop and Implement an AI Policy



Part 3 Table Discussion (15 mins)

- » What are the biggest challenges to going from a blank page to a policy for you?
- » What are two or three AI uses you'd greenlight at your organization today?
- » How will you include staff in the building of this policy and potential use cases?

Final Thoughts

Key Takeaways

- » AI is already being used and is constantly changing. Developing protocols can help you channel that usage for maximum benefit and innovation, protect your data, and stay in alignment with your values.
- » A successful process involves a discovery phase, a research phase, and an iterative phase that allows for stakeholder involvement and buy-in all along the way.
- » Policy implementation is not one-and-done. Trainings and periodic reviews will help you stay current.

What 's Next?

- » Slides available for download on the app
- » Example AI Policy from the League
- » AI resources page under development

If you'd like to share your organization's AI Policy or other AI resources with the field, email us at aclark@americanorchestras.org and rgallant@americanorchestras.org