

SOP Templates

ESSENTIAL BINDER RESOURCE: Executive Office AI Policy

Framework for Responsible & Secure Deployment

The Golden Rule of AI: AI is the Assistant, you are the Editor. Never let a machine have the Final Word on a document that carries the President's signature or the Institution's reputation.

I. Data Security & Privacy (The Vault Protocol)

- **Enterprise Only:** Staff are strictly prohibited from using Open/Public AI models (Free ChatGPT) for institutional work. All AI interaction must occur within the College's Enterprise-Grade Environment (Microsoft 365 Copilot), where data is protected and not used to train global models.
- **PII Scrubbing:** Before uploading any document for synthesis, all Personally Identifiable Information (PII)—including SSNs, home addresses, private donor amounts, and specific health data—must be redacted.
- **The Stay Inside Rule:** Sensitive data must never leave the institutional cloud. If the AI tool requires Exporting data to a third-party site, the task is canceled.

II. Transparency & Disclosure

- **The AI-Assisted Watermark:** Any internal draft significantly generated by AI should be noted as AI-Assisted Draft for the President's awareness.
- **Executive Consent:** The President must be briefed on which tasks are being delegated to AI (I am using AI to summarize these 100 pages of board prep into a 3-page brief).

III. Verification & Hallucination Checks

- **Fact-Checking Mandate:** AI is known to hallucinate (invent facts, dates, or quotes). No AI-generated content may be finalized without a Human-in-the-Loop (HITL) verification against a primary source.
- **Citation Audit:** If the AI provides a citation or a legal reference, the Assistant must manually verify the existence of that statute or quote.

IV. Ethical Communication & Bias

- **Voice Alignment:** AI should be used to *structure* the President's voice, not *replace* it. The final tone must be audited to ensure it reflects the President's authentic values and institutional mission.
- **Bias Awareness:** Be vigilant for hidden bias in AI-generated policy summaries. If an AI suggests a course of action, the Assistant must ask: Does this recommendation align with our goals and community values?

V. Approved Executive Use-Cases

1. **Administrative Synthesis:** Summarizing meeting transcripts or long-form reports.
2. **Drafting Support:** Creating Version 1 of speeches, emails, or memos.
3. **Project Outlining:** Generating task lists, timelines, and Bucket categories for event planning.
4. **Policy Scanning:** Identifying key changes in large regulatory updates.

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THE MASTER THE PROMPT CHEAT SHEET

From Generic Chat to Strategic Partner

The effectiveness of AI is 10% the model and 90% the Context you provide. Use the R.A.S.E. Framework to ensure every output meets the Presidential standard.

1. The R.A.S.E. Framework

- **R - Role:** Tell the AI who it is.
 - *Instead of:* Write a letter.
 - *Try:* Act as a Senior Executive Assistant at a Hispanic-Serving Institution (HSI) with 120 years of history.
- **A - Action:** Use strong verbs.
 - *Try:* Synthesize, Audit, Draft, Categorize, or Simplify.
- **S - Specifics:** Give it the meat.
 - *Try:* Use the attached meeting transcript, or Based on the metrics from House Bill 8.
- **E - Expectation:** Define the format and tone.
 - *Try:* Create a 3-bullet executive summary, or Use a tone that is professional but no jargon.

2. High-Impact Executive Prompts

3. The Privacy-First Workflow (The John Doe Trick)

To protect sensitive data while harnessing AI's brain:

1. **Sanitize:** Replace names/IDs in Word (Change John Doe to Candidate X).
2. **Upload:** Provide the sanitized text to the AI.
3. **Process:** Ask for your summary or draft.
4. **Restore:** Copy the AI output back to Word and Find/Replace the real names back in.

4. The Anti-Crutch Checklist

Before you send an AI-generated draft to the President, ask:

- [] **Fact Check:** Did I verify every date, name, and dollar amount against a primary source?
- [] **Voice Check:** Does this sound like my leader, or does it sound like a robot?
- [] **Value Check:** Does this align with our institutional mission and the numbers-first preference of the President?