BEHAVIORAL SCIENCE RESEARCH INSTITUTE

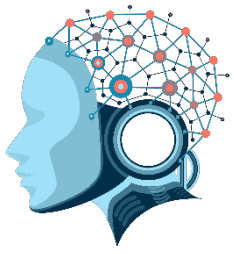
Responsible AI Use in Evaluation

PURPOSE

This guide is intended to help nonprofit organizations, evaluators, and community partners use artificial intelligence (AI) responsibly, ethically, and effectively within evaluation practice. As AI tools become more accessible, they offer opportunities to improve efficiency, enhance data analysis, support communication, and streamline administrative tasks. However, these tools also introduce important considerations related to privacy, bias, transparency, data security, and human oversight. The purpose of this guide is to provide practical recommendations and examples that encourage thoughtful AI use while maintaining the integrity, accuracy, and ethical standards essential to evaluation work and community trust.

Use Case

Use Case	Examples
Data Cleaning & Organization	Organizing datasets, formatting variables, preparing data for analysis
Summarizing Qualitative Data	Summarizing interview transcripts, focus group discussions, and open-ended survey responses to identify recurring themes and patterns
Drafting & Brainstorming Aid	Drafting reports, executive summaries, presentation outlines, or brainstorming language for communication materials
Survey & Tool Development Support	Generating sample survey questions, interview prompts, or logic model language
Literature Review Assistance	Summarizing research articles or identifying broad trends across publications
Administrative Support	Creating meeting summaries, drafting agendas, or organizing project notes



ABOUT BSRI

BSRI was created to support informed and effective decision-making for our partners with tools, resources, and data for action. As we wind down operations, we are creating these resources for the community to continue the work. We use our guiding principles in engaging with partners and communities, putting people first through accountability and reciprocity, communicating transparently, and sharing our knowledge widely.

ABOUT THIS DOCUMENT

BSRI developed this document to guide nonprofit organizations, evaluators, and community partners on the responsible and ethical use of artificial intelligence (AI) in evaluation activities. As AI tools become increasingly common in workplace settings, they offer opportunities to improve efficiency in tasks such as data organization, qualitative data summarization, and report drafting. This guide outlines appropriate use cases, potential risks, and recommended best practices to help organizations use AI thoughtfully while maintaining accuracy, transparency, privacy, equity, and human oversight throughout the evaluation process.

USE OF ARTIFICIAL INTELLIGENCE (AI)

Our organization utilizes artificial intelligence (AI) tools to enhance efficiency, support data analysis, and strengthen evaluation practices. We also encourage our partners and clients to thoughtfully explore AI as a means to build future-ready evaluation capacity. All AI use is governed by strict data privacy and ethical standards. We do not input any personally identifiable information (PII), protected health information (PHI), or other sensitive data into AI systems in a manner that would violate HIPAA or other applicable privacy regulations.

Additionally, we exclusively use licensed AI tools and platforms that explicitly prohibit the use of submitted data for model training or retention beyond the scope of the intended task. This ensures that all information remains confidential, secure, and protected.

INTRODUCTION

Artificial intelligence (AI) tools are becoming increasingly common across workplaces, including nonprofit organizations and evaluation settings. These tools can help teams work more efficiently by supporting data organization, summarizing information, brainstorming ideas, and drafting written materials. As AI technologies continue to evolve, they may provide new opportunities to strengthen evaluation processes and improve the communication of findings.

At the same time, AI tools also introduce important ethical, practical, and privacy-related considerations. AI systems can produce inaccurate information, reinforce bias, misunderstand context, or mishandle sensitive data if used improperly. Because evaluation work often involves vulnerable populations, confidential information, and community trust, AI tools must be used thoughtfully and responsibly.

The purpose of this guide is to support nonprofit staff, evaluators, and community partners in understanding appropriate uses of AI within evaluation activities. This document outlines common use cases, guiding principles, risks, and recommended best practices to help organizations use AI in ways that are ethical, transparent, secure, and aligned with professional evaluation standards.

WHAT IS ARTIFICIAL INTELLIGENCE (AI)?

Artificial intelligence (AI) refers to computer systems designed to perform tasks that typically require human thinking, such as summarizing information, generating text, recognizing patterns, or answering questions. Many modern AI tools use large amounts of existing data to identify patterns and generate responses based on user prompts.

Examples of commonly used AI tools you may have heard of include:

- ChatGPT
- Microsoft Copilot
- Google Gemini
- Claude

These tools can assist with administrative and analytical tasks, but they are not capable of human judgment, lived experience, or contextual understanding. AI-generated outputs may contain errors, biases, or incomplete information and should always be reviewed by qualified staff.

GUIDING PRINCIPLES FOR RESPONSIBLE AI USE

1. Human Oversight and Accountability

AI should support, not replace, human judgment. Staff remains responsible for reviewing, interpreting, and validating all AI-generated outputs before they are used in evaluation products or decision-making processes.

Final decisions, interpretations, and conclusions should always involve human expertise and contextual understanding.

2. Privacy and Confidentiality

Evaluation activities often involve sensitive participant information. Staff should avoid entering personally identifiable information (PII), confidential records, protected health information (PHI), or sensitive community data into public AI tools unless explicitly approved by organizational policy.

Examples of sensitive information include, but are not limited to:

- Names
- Addresses
- Phone numbers
- Dates of birth
- Medical or behavioral health information
- School records
- Case management notes

Organizations should follow all applicable privacy laws, funding requirements, and internal data protection policies.

3. Accuracy and Verification

AI-generated content can sound accurate and trustworthy, even when it includes mistakes, incorrect information, or misunderstandings of the data. All outputs should be reviewed carefully for:

- Accuracy
- Completeness
- Cultural relevance

- Appropriate interpretation

AI should not be treated as a source of truth. It wants to produce an output that will make you happy, even if that involves making information up.

4. Equity and Bias Awareness

AI systems learn from large amounts of information collected from many sources. As a result, AI-generated content can sometimes reflect existing biases, reinforce stereotypes, or miss important community perspectives. Reviewing outputs carefully can help ensure they are accurate, respectful, and inclusive.

Evaluation staff should critically review outputs to ensure they:

- Reflect community context
- Use inclusive language
- Avoid harmful assumptions
- Represent findings fairly and accurately

5. Transparency

Organizations should be transparent about how AI is used within evaluation activities, particularly when AI substantially contributes to data analysis, reporting, or communication products. This transparency may include disclosing when AI was used to summarize interview data, draft report sections, create visualizations, generate survey questions, or support data coding. Organizations can also explain how AI outputs were reviewed and validated by staff, what safeguards were used to protect participant information, and any limitations associated with AI-assisted analyses.

Transparency helps maintain trust with all organizational relationships, including funders, program participants, community partners, and other collaborators.

RISKS AND LIMITATIONS OF AI

While AI tools may improve efficiency, they also have important limitations.

Potential Risks

- Inaccurate or fabricated information (“hallucinations”)

- Misinterpretation of qualitative data or community context
- Reinforcement of existing biases
- Privacy and confidentiality concerns
- Overreliance on automated outputs
- Loss of nuance in participant experiences
- Copyright or intellectual property concerns

AI tools should never replace direct engagement with participants, community voice, or evaluator expertise.

BEST PRACTICES FOR STAFF AND PARTNERS

To support responsible AI use, organizations should consider the following best practices:



Recommended Practices

Before Using AI

- Ensure staff receive training on ethical and responsible AI use.
- Use organization-approved AI platforms.
- Remove identifying or sensitive information before entering data into AI tools.

During AI Use (Think Human Input → AI Assistance → Human Review)

- Clearly define the task for AI in the prompt.
- Provide meaningful human input and direction rather than relying on AI to independently generate final work products.
- Instruct AI to rely only on the data, documents, or materials provided unless external sources are intentionally required.
- Use AI as a support tool and starting point rather than a final decision-maker or finished product.
- Review AI-generated outputs as they are developed, paying attention to potential inaccuracies, bias, or misinterpretations.
- Edit and refine AI-generated content to ensure it reflects the organization's voice, standards, and intended purpose.
- Request that AI provide you with links and sources for verification.
- Maintain human oversight throughout the process, with staff retaining responsibility for the accuracy, quality, and integrity of all AI-assisted work.

After Using AI

- Verify summaries, analyses, and interpretations against the original data and source materials.
- Review all AI-generated content before sharing, publishing, or using it to inform decisions.
- Document when AI tools contributed significantly to evaluation activities, analyses, reports, or other deliverables.

Practices to Avoid

- Uploading confidential participant information into public AI platforms
- Using AI to make decisions about program effectiveness or value
- Copying AI-generated findings directly into reports without review
- Assuming AI outputs are unbiased or factually accurate
- Relying solely on AI for data interpretation

Conclusion

AI has the potential to support nonprofit evaluation work by improving efficiency, reducing administrative burden, and helping teams organize, summarize, and communicate information more effectively. When used thoughtfully, these tools can free up valuable time and resources, allowing organizations to focus more deeply on learning, improvement, and community impact. Remember, AI should be viewed as a tool to support evaluation. It is not a replacement for human expertise, lived experience, professional judgment, or meaningful community engagement. Responsible AI use requires ongoing attention to privacy, accuracy, transparency, equity, and accountability. By combining the benefits of AI with the knowledge and insight of evaluators, practitioners, and community partners, organizations can strengthen their evaluation capacity while maintaining the trust, integrity, and people-centered values that are essential to effective evaluation practice.

AI can help us work faster, but people must remain at the center of evaluation work.