

SAMPLE

PSMJ Resources, Inc.®

2024 A/E Artificial Intelligence Policies

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Sample Policy from PSMJ's 2024 A/E Artificial Intelligence Policies Compilation

"We", "our", or "the Company" recognizes that generative AI tools like OpenAI's ChatGPT and Google's Bard create significant opportunities to enhance workplace productivity, efficiency, and effectiveness. However, it is imperative that our use of these tools be consistent with Company values and standards, customer requirements, and applicable law.

To that end, we have developed this policy, which is designed to enable the Company, its employees, and its customers to benefit from this exciting technological advancement, while at the same time ensuring that we remain true to our core principles and that we appropriately manage risk.

In addition to the requirements below, all employee use of generative AI tools is subject to the Company's Handbook (Section 4, Pages 20 through 29: Internet Usage and Monitoring, Acceptable Use of Electronic Communications, and social media). Failure to comply may subject employees to discipline as outlined in the Employee Handbook.

Approval – Tools and Purposes. Employees who wish to use generative AI tools for work purposes should submit a request to the key contact persons indicated in this policy. In your submission, please identify (1) the specific tool(s) you intend to use (e.g., ChatGPT), (2) the purpose(s) for which you intend to use it or them (including, if applicable, which customers you intend to do work for using the tool(s)), and (3) the categories of Company data you intend to input for that or those purpose(s).

At present, the Company has approved the following tools for use by workforce members for approved purposes:

- ChatGPT (Summarizing, researching, creating ideas, planning and strategy)
- Bard (Research in real-time data, market studies, planning and strategy)
- Others will be added in future updates of this policy.

Use AI Tools Only on Company Systems. All use of generative AI tools for approved work purposes must be exclusively on Company-issued systems, workstations, and devices. This means that you may not use generative AI tools to carry out Company business, including, without limitation, work on behalf of any Company customer, while using any personal device, workstation, system, application, or account.

Confidentiality, Data Privacy, and Data Security. Employees should view inputs to a generative AI tool as akin to disclosures to a third party. Just as you would not email certain confidential information (as listed below) to an outside party, you should not, subject to applicable law, input such information into a generative AI tool.

Confidential information includes (but is not limited to):

- Company financial or strategy information
- Business plans and models
- Information related to a company's business operations
- Franchise evaluation material
- Client lists and other trade secrets
- Intellectual property and/or other similar information
- Personally identifiable information

As an example, asking a generative AI tool to, for instance, summarize Company financials, turn a strategy memo into a PowerPoint deck, or prepare a response to a customer or the public regarding a specific problem that occurred, would NOT be acceptable uses of these tools. Any questions or doubts concerning confidential information should be referred to the key contact persons indicated in this policy.

ACCURACY. Employees must closely review and fact-check all outputs from generative AI tools. Though their outputs are polished and credible sounding, generative AI tools routinely generate responses that are factually inaccurate and/or that may be inconsistent with our business practices, principles, obligations, and objectives. If an employee is unable to independently verify that a generative AI output is factually accurate and consistent with our business practices, principles, obligations, and objectives, they must, prior to use, paste the output into a Google search to see if there are any hits. Ultimately for unresolved cases, submit the output to the key contact persons indicated in this policy for review and approval.

INTELLECTUAL PROPERTY. Employees may not use generative AI tools to produce content with respect to which the Company might have Intellectual Property (IP) rights. Additionally, employees must be mindful that outputs from generative AI tools may include the intellectual property of others, which the Company is not permitted to use without appropriate attribution or other requisite action. Prior to public dissemination or publication of any output from a generative AI tool, employees must paste the output into a Google search to see if there are any hits. Ultimately for unresolved cases, submit the output to the key contact persons indicated in this policy for review and approval.

BIAS. Any potential use of generative AI tools to assist with decision-making – such as with respect to how to respond to a customer complaint, which customers to offer preferential pricing or other terms to, and/or which applicants to hire or employees to promote – must be approved by the key contact persons indicated in this policy. These tools may have imbedded biases about which we are unaware and their use to assist with decision-making may trigger a number of legal, ethical, and business issues that need to be carefully considered. AI should not make decisions, but rather be used to help us think through potential situations.

MONITORING. At all times, the Company has the right, but not the obligation, to access, monitor, and record employee use of generative AI tools on Company information systems. To this end, the company has established and will assign a set of logins that are acceptable to use for AI purposes. Other customized options may be established later as needed. At no time are you allowed to change the preassigned password. If for some reason the password does get changed, you are required to report the new password to your manager within 1 business day. Employees should not have any expectation of privacy with respect to any inputs to or outputs from generative AI tools used on Company information systems.

ASKING QUESTIONS AND REPORTING VIOLATIONS. Please direct any questions regarding this policy, or about the use of generative AI in connection with your work for the Company, to the key contact persons indicated in this policy. Employees should promptly report any suspected violations of this policy, or violations of other applicable Company policies stemming from the use of generative AI tools to the key contact persons indicated in this policy.

SUBSCRIPTIONS. Currently, the Company is not reimbursing the cost of any subscription for a generative AI tool, unless expressly approved by the Company. If you would like to enroll in a subscription in order to use a generative AI tool solely for work-related purposes at the Company, contact the key contact persons indicated in this policy. The company may establish and assign a set of logins for this purpose.

TRAINING. Managers will be trained as needed on the proper use of generative AI chatbots in the workplace. Optional employee training may be considered to ensure effective policy implementation

UPDATES. The Company will continue to closely monitor this burgeoning new area and will update this policy, as appropriate, to address new use cases, legal developments, and other considerations. Get the complete policies collection!

This sample policy is extracted from PSMJ's 2024 A/E Artificial Intelligence Policies book, containing 43 policies in use in architecture and engineering firms. Download the complete collection and create or update your A.I. policy to align with best practices. [CLICK HERE](#) to learn more!
