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THE JEWISH EXECUTIVE DIRECTOR'S AI STARTER KIT

A practical framework for Jewish nonprofit leaders navigating AI with strategy, integrity, and confidence.



WELCOME TO THE AGE OF AI IN ORGANIZATIONS



Artificial intelligence is not simply a tool for writing faster emails.

It is reshaping how organizations think, communicate, plan, and make decisions.

For executive directors of Jewish nonprofits — synagogues, schools, camps, federations, foundations, national organizations — AI presents both opportunity and responsibility.

It can increase efficiency, unlock creativity, and support strategy. It can also introduce risk, bias, and ethical complexity. This guide is designed to help you approach AI not as a trend to chase, but as a leadership issue to steward.

Whether you're brand new to AI or already experimenting, this guide will help you start small, stay thoughtful, and scale responsibly.

You don't need to be an expert. You just need curiosity, attention, and a willingness to explore. This guide is here to help you do just that – step by step, in ways that are doable and meaningful.

We don't have all the answers yet, and that's okay. What matters most is starting the conversation, modeling curiosity, and guiding your organization with values in mind. The rest we can figure out together.

Warmly,
Sarah Rubinson Levy



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WHY AI? WHY NOW?

Across the nonprofit world, organizations are using AI to work smarter, freeing time for the human work that matters most — connection, creativity, and care.

In organizations, AI can:

- Save time by automating repetitive tasks like summarizing notes or drafting messages.
- Inspire creativity through idea generation for programs, themes, and training.
- Enhance communication by helping staff write clearly and consistently.

But there's one thing AI can never do: replace relationships, judgment, or heart.

WHAT IS AI?

WHAT ISN'T IT?

Most leaders encounter AI through tools like ChatGPT.

These are examples of generative AI — systems trained on large amounts of text that can generate new content based on prompts.

They are exceptionally good at:

- Drafting written materials
- Organizing ideas
- Summarizing large amounts of text
- Generating structured outputs (plans, outlines, checklists)
- Offering multiple options quickly

They are not:

- Decision-makers
- Fact-checkers
- Moral agents
- Context-aware community members

AI predicts language. It does not understand your community.

This distinction matters. As an executive director, your role is not to “use AI.” Your role is to determine how and when AI serves your mission without compromising your values.

WHERE AI CAN BE MOST USEFUL FOR EXECUTIVE DIRECTORS

AI becomes powerful when applied to recurring cognitive labor — the work that requires thought, structure, and synthesis but not final judgment.

Communications & Messaging

Executive directors spend a significant amount of time communicating, often about complex or sensitive issues.

AI can help:

- Draft difficult emails (budget changes, staffing shifts, dues adjustments)
- Refine tone to be clearer, warmer, or more transparent
- Create event descriptions that inspire attendance
- Turn long explanations into concise updates
- Generate multiple framing options before choosing one

It does not replace your voice. It gives you more options before you decide how to speak.

Operations & Infrastructure

Operational leadership involves documentation, clarity, and systems — areas where AI can significantly reduce friction.

Examples:

- Writing job descriptions
- Creating onboarding guides
- Drafting HR policies
- Developing process checklists
- Generating survey instruments
- Structuring project plans

AI is particularly effective at creating first drafts of systems that you then refine.

Creativity & Innovation

Executive directors are often asked to reimagine legacy structures while honoring tradition.

AI can help:

- Brainstorm new program models
- Generate alternative dues structures
- Develop engagement strategies for specific demographics
- Explore new messaging around mission
- Co-create multiple tagline options

It can function as a thinking partner, especially when your internal team is small.

Governance & Strategy

Much of an executive director's work involves preparing others to make decisions.

AI can assist by:

- Turning board notes into structured summaries
- Drafting first-pass strategic plan frameworks
- Creating comparison charts of options
- Generating questions to bring to a board discussion
- Identifying risks or blind spots in a proposed initiative

It can surface possibilities quickly — allowing you to focus on the higher-level discernment that governance requires.

Data & Reporting

Many Jewish nonprofits collect data but struggle to interpret it meaningfully.

AI can:

- Summarize spreadsheets into plain-language reports
- Highlight trends across engagement metrics
- Turn raw numbers into narrative board reports
- Generate insights to test in conversation

Used wisely, it can make data more accessible — without replacing analysis.

LEADING A TEAM IN AN AI ERA

Perhaps the most important executive responsibility is not using AI yourself, but leading others in how to use it responsibly.

AI introduces new dynamics within staff teams:

- Some staff will be early adopters.
- Some will be anxious.
- Some may quietly use it without guardrails.
- Some may over-rely on it.

Your role is to shape culture.

1

Normalize Experimentation — Within Boundaries

Create space for staff to explore AI for low-risk tasks. Encourage learning. Reduce stigma. But be explicit about:

- What types of data may never be entered
- What decisions require human review
- Where transparency is required

Clarity reduces risk.

2

Prevent “Shadow AI”

When organizations don't talk about AI, staff use it anyway — without guidance.

Executive directors should:

- Open the conversation
- Provide basic training
- Offer clear parameters
- Model responsible usage

Silence creates more risk than thoughtful policy.

3

Maintain Human Dignity

AI should never:

- Replace pastoral care
- Generate performance evaluations
- Determine disciplinary decisions
- Substitute for sensitive member communication

Make it clear: human relationships remain primary.

4

Address Equity & Bias

AI systems reflect historical bias embedded in data.

Leaders must ask:

- Does this output reflect inclusive language?
- Does it assume one demographic norm?
- Does it erase difference?

Executive oversight is essential.

AI READINESS SELF-ASSESSMENT

Is Your Organization Ready for AI?

Check your readiness with this quick 10-point tool:

- We have clear policies about technology and data use.
- Staff understand basic AI tools and privacy guidelines.
- We have time to pilot and reflect before scaling up AI projects.
- Our leadership supports ethical innovation.
- We evaluate AI tools through a Jewish values lens.
- We've identified 1–2 areas where AI could save time.
- We review and revise all AI-generated content before use.
- We have a designated person responsible for oversight.
- We talk about values, not just efficiency.
- We're committed to experimenting and learning together.

Score yourself:

8–10 = Ready to experiment responsibly!

5–7 = Start small and focus on training.

0–4 = Begin with foundational policy and learning.

A Practical AI Adoption Roadmap

If you want to move forward intentionally:

Step 1: Identify Low-Risk Use Cases
Start with internal drafting and idea generation.

Step 2: Create Clear Boundaries
Define what is prohibited.

Step 3: Pilot with Leadership
Experiment at the senior level first.

Step 4: Train Staff
Provide prompting guidance and data safety rules.

Step 5: Evaluate Impact
Where did this save time? Improve clarity? Create concern?

Bringing Jewish Values into the AI Conversation

Use this tool to ensure every use of AI reflects the heart of your organization's mission. Discuss it with your team when piloting new tools or processes.

Jewish Value	Guiding Principle	Guiding Questions	Example
B'tzelem Elokim Human-Centered Leadership	AI should enhance, not replace, meaningful human connection and judgment.	<ul style="list-style-type: none"> Does this AI tool empower staff and strengthen relationships, or does it depersonalize work? Are we ensuring that human leadership remains at the center of decisions? 	Using AI to draft thank you letters, but having staff members personalize each message before sending, keeps the warmth intact.
Achrayut Responsibility	AI use should be clear, documented, and accountable.	<ul style="list-style-type: none"> Are those impacted aware when AI is being used? Who reviews and approves AI-generated content? 	Sharing in your membership email that parts were drafted with AI (reviewed by staff) models transparency.
Tzedek Justice	AI should promote fairness and inclusion.	<ul style="list-style-type: none"> Could this tool create or reinforce inequity? Have we considered diverse perspectives in how this tool is implemented? 	Checking that AI-generated program ideas are inclusive across age, ability, and background.
Shmirat Halashon / B'tzelem Elokim Privacy & Protection	AI must safeguard personal and sensitive data.	<ul style="list-style-type: none"> Are we protecting member and staff data from misuse? Does this use of AI respect individual dignity and consent? 	Avoid inputting names, photos, or stories that could identify members or staff.
Emet Integrity & Authenticity	AI should reflect the organization's voice, mission, and spirit.	<ul style="list-style-type: none"> Does this output accurately represent our organization's tone and values? Are we clear about what is human-created versus AI-assisted? 	Reviewing all AI-generated content before sharing ensures it "sounds like us."
Bal Tashchit Stewardship & Sustainability	Use AI responsibly to enhance—not replace—the stewardship of resources and people.	<ul style="list-style-type: none"> Is AI being used efficiently and ethically? Are we balancing innovation with tradition? 	Using AI to streamline administrative tasks so staff can focus more on participant experience.

AI VALUES REFLECTION TOOL

SECRETS TO USING AI WELL

Secret #1: Craft the Prompt

AI performs best when given clarity.

Include:

- Role: Who is AI being?
- Task: What exactly do you want?
- Context: Audience, situation, tone
- Output: Format, length, structure
- Values: What Jewish or organizational principles should guide the response?

Example:

You are an executive director of a mid-sized synagogue. Draft a 250-word message explaining a new security protocol. Tone: calm, transparent, and community-centered. Include three bullet points explaining what members need to know and a short paragraph connecting this decision to pikuach nefesh (protecting life).

The more context you give, the better the output.

Secret #2: Stay in Dialogue

AI improves when you refine it.

Prompt or ask:

- “Make this more concise.”
- “Where might this cause concern?”
- “What am I overlooking?”
- “Offer three alternative framings.”
- “Rewrite this with more warmth.”

Think of AI as a junior collaborator. The first draft is rarely the final draft.

Secret #3: Review and Revise

AI reflects patterns — not truth.

Always check:

- Accuracy
- Tone
- Sensitivity
- Inclusivity
- Alignment with mission
- Legal or governance implications

If you would not be comfortable explaining how you used AI in a board meeting, reconsider the use case.



PROMPT STARTERS & TEMPLATE

Start Here - Prompt Starters:

- “Help me organize...”
- “Summarize this text in...”
- “Brainstorm 10 ways to...”
- “Draft a first version of...”
- “List potential improvements for...”

Tip: Save great prompts in a shared library so everyone benefits.

Bonus: Build Your Own Prompt Template

Role + Task + Context + Tone + Output format + Guardrails

GUARDRAILS FOR JEWISH NONPROFITS

Trust is foundational in Jewish communal life.

Never input:

- Personal identifiable information
- Health or learning records
- Personnel files
- Donor giving history
- Confidential board materials
- Security plans

When testing prompts, use fictional or anonymized examples.

Human Judgment Is Required For:

- Hiring and firing
- Evaluations
- Crisis response
- Pastoral communication
- Public-facing theological positions

AI supports leadership. It does not replace it.

AI as a Governance Issue

Executive directors should treat AI as part of risk management.

Questions to consider:

- Does our organization need an AI usage policy?
- Who is responsible for oversight?
- Have we trained staff?
- What vendors are we relying on?
- How transparent should we be with members?

Technology adoption without governance can erode trust.

Governance without understanding can create fear.

Leadership requires balance.

EXECUTIVE DIRECTOR'S AI CHECKLIST

Before using AI, ask:

- Have I removed all sensitive information?
- Is this task appropriate for AI assistance?
- Did I clearly define role, task, context, and output?
- Have I reviewed the output carefully?
- Does it reflect our values and communal tone?
- Would I be comfortable explaining this publicly?
- Is final human judgment clearly retained?

Reflection Questions for Executive Directors

- Where am I overextended in cognitive labor?
- What repetitive work could AI assist with?
- Where must humans remain firmly centered?
- How does our Jewish mission shape our AI boundaries?
- What would responsible experimentation look like this year?



FINAL THOUGHT

AI can make Jewish nonprofits more efficient. It can make communication clearer. It can help generate ideas more quickly. But it cannot create meaning. It cannot build trust. It cannot carry covenant. That remains the work of leadership.

Used wisely, AI can free executive directors to focus on: vision, relationships, stewardship, community-building, Torah and mission. And that is work worth protecting.

Getting started with AI can feel overwhelming. It's new, fast-moving, and sometimes confusing.

That's why I created this guide — to give you clear steps to get started.

And, you don't have to figure it out alone. I invite you to reach out so we can schedule a time to connect and discuss how to approach AI within your organization. Together, we can:

- Talk about what you are already experiencing with AI and where guidance is needed.
- Identify challenges or concerns you might have around values-driven AI usage.
- Map out simple, actionable steps you can take to lead your staff through your AI journey.

We're all learning as we go, and you don't have to navigate this alone. Let's take the next step together.

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About Sarah

Dr. Sarah Rubinson Levy empowers excellence and innovation in education, partnering with clients to achieve the level of quality and distinction they desire for their Jewish organizations - serving as a strategic project manager, thought partner, and/or content expert.

With over 20 years of experience, including a master's and a doctorate as well as certificates in Day School Education, Jewish Leadership Studies, Jewish Educational Leadership, and Executive Coaching, Sarah helps leaders look towards the future, elevating their in-house teams and resources to foster effective, joyful, future-ready environments through a process that focuses on clarity, strategy, and execution. Her focus on AI includes certificates in Elements of AI and Responsible AI as well as a TEDx talk titled "Why AI is the Catalyst We Need to Change Education Forever."

She is a proud Colorado native and currently lives in Denver, CO with her four kids, beta fish, and leopard gecko and is always more than happy to weigh in on the best place to ski.



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