



FOR ENVIRONMENTAL FINANCE, CONSERVATION & MISSION-DRIVEN ORGANIZATIONS

# Build your organization's standards for AI — **in practice, not in theory.**

A practical operating program created by environmental finance practitioners — for the teams running grant programs, conservation finance, and complex public-sector work. We start with the work you already do, and leave you with documented standards your organization owns.

## THE PROBLEM

### It's an operating gap — not a training gap.

Your team is already using AI — probably inconsistently, without shared standards, and without much written down. More information won't fix that. Structure will.

## THE APPROACH

### Operational guidance, not AI hype.

This isn't a lecture series, a literacy course, or a vendor pitch. It's a facilitated engagement that begins with your actual processes and ends with standards your team can use, maintain, and hold the line on.

## THE CENTERPIECE · START HERE

# The Workflow Audit

Before the modules begin, CapyrAI helps your team assess where AI can be useful, where it is urgent, and where it is not the right solution. Each major workflow is scored for AI Fit and organizational urgency — creating a practical roadmap for what to address first, what to queue for later, and what to leave alone.

## HOW IT WORKS



### AI Fit

How suitable the workflow is for AI support.



### Urgency

How pressing the workflow problem is for the organization.



### Output

A prioritized roadmap for what to do first, queue, or leave alone.

# After the audit: the five modules

Each module covers one governance domain — CapyrAI facilitates, your team decides, and you keep what you build.

01

## Tool Standards

✔ APPROVED TOOL STANDARDS

CapyrAI gives your team a guided tour of available AI tools — strengths, limitations, privacy and cost considerations, and practical use cases. Your team then decides which tools make sense and documents an approved approach.

02

## Data Standards

✔ DATA HANDLING MATRIX

CapyrAI helps your team define what types of information can and cannot be used with AI tools — creating a practical data handling framework that staff can actually follow.

03

## Workflow Standards

✔ UPDATED AI-ENABLED SOPs

CapyrAI helps your team walk through how existing processes would be rewritten in an AI-enabled environment: what humans do, what AI can support, where review is required, and how handoffs should work.

04

## Human Review Standards

✔ REVIEW & SIGN-OFF PROTOCOL

CapyrAI helps your organization define where human review is required, what good review looks like, and who has authority to approve AI-assisted work.

05

## Accountability & Review Cycle

✔ GOVERNANCE FRAMEWORK

CapyrAI helps your team establish how AI standards are maintained over time — ownership, review cadence, tool updates, and how new use cases are evaluated.

## Who this is for

Mission-driven organizations already experimenting with AI that need shared standards, practical guidance, and documented workflows.

Conservation organizations

Environmental nonprofits

Watershed organizations

Foundations

Green banks

Government contractors

Environmental consulting firms

Recommended group size: up to 20 staff.

Decision-makers usually include executive directors, operations leads, program managers, and senior staff responsible for organizational systems and quality control.

## How to start

### Start with the Workflow Audit.

Every engagement begins with a facilitated Workflow Audit led by CapyrAI. We help your team identify where AI can create real value, where better process design is needed, and what standards should be built first.

✉ [hello@capyrai.com](mailto:hello@capyrai.com)

Email us to get started.