

THE STONE HOUSE GROUP

Artificial Intelligence (AI) Policy

How SHG Uses AI to Advance Your Mission and How We Protect Your Information

Effective May 2026

BOTTOM LINE

- SHG uses AI selectively to enhance the quality, speed, and depth of our consulting work, not to replace the judgment of our experienced team.
- All AI-assisted findings are reviewed and validated by our professionals before delivery.
- Client data is never used to train AI models or entered into an open or public AI tool.
- Clients who require an AI-free engagement will be fully accommodated.
- This policy applies to every SHG associate. This is a living policy and will continue to evolve.

OUR PHILOSOPHY

At The Stone House Group (SHG), we believe every institution deserves facilities that support its mission, not undermine it. That belief has guided us since 1999, and it guides how we approach artificial intelligence today.

We use AI to support our mission of “Building Stewardship” — helping institutions maintain safe, efficient, and mission-aligned facilities — as a tool that amplifies expert judgment, not one that replaces it. AI helps us move faster. Our experience tells us what matters.

We do not use AI to replace the field expertise, technical judgment, and trusted relationships that define our work. We use it to focus that expertise where it matters most.

GROUNDING IN OUR B CORP VALUES

SHG is a Certified B Corporation. Our commitment to social and environmental responsibility extends to how we adopt technology.

We consider the impact of our decisions on our clients, our community, and the environment. We hold ourselves accountable to a standard beyond profit. When we adopt a technology as consequential as AI, we do not simply ask what it can do for us. We ask whether we are using it responsibly, transparently, and in a way that serves the people and institutions who trust us.

Our B Corp values are the fixed point. Our tools, workflows, and understanding of AI will keep evolving around them.

WHAT YOU CAN EXPECT FROM US

These commitments govern every project, at every office, without exception.

- **Human judgment is final.** AI informs our process, but an experienced SHG professional reviews and approves every recommendation before it reaches you. We do not outsource our conclusions.
- **Your data stays protected.** We use only approved, secure platforms. Client data, project information, and proprietary SHG methodologies are never entered into open or public AI tools and are never used to train AI models. All information you share with SHG remains confidential.

- **Field knowledge cannot be automated.** AI can draft a report. It cannot walk your campus, assess building conditions, or understand your operational realities. Our consultants do that work, and it remains the foundation of every recommendation we make.

HOW AI IS USED AT SHG

SHG uses AI to improve internal processes, workflows, and service delivery across the firm.

Some templates, document structures, and formatting reflect AI-assisted development. This is standard practice and does not mean your project data was involved. When AI directly supports your project, a consultant remains responsible for the final work product.

AI tools assist our team with:

- Synthesizing large datasets and identifying patterns in energy and facilities data
- Organizing documentation, reports, and client communications
- Accelerating research and comparing technical or financial options
- Improving consistency and reducing manual effort in repeatable workflows

AI-FREE ENGAGEMENTS

Some clients cannot use AI tools due to policy, contractual, or regulatory requirements. Others choose not to; SHG accommodates both.

Clients requiring an AI-free engagement should notify their SHG project lead at the outset. We will document that requirement, communicate it to every team member, and honor it throughout the engagement. No client data, documents, or project details will enter any AI platform.

An AI-free engagement does not affect the quality or scope of our work. Your project will be completed using the same professional standards SHG has applied since our founding.

A LIVING POLICY

We are not done learning.

AI is moving quickly, and the standards around its responsible use are still being written. The Stone House Group will continue to monitor developments in AI technology and regulation, research emerging best practices, and stay current on policy and guidance. When what we learn changes how we should work, we update this policy and our practices. We will review this policy at least annually.

We welcome questions and encourage open dialogue about how AI applies within your specific engagement.

