

AI Tooling & Budget Policy

Governing framework for AI tool acquisition, budget management, and ROI accountability.

Effective Date	May 15, 2026	Review Cycle	Annually or as needed
Policy Owner	Rafael Norman M. Morales / Digital Transformation & AI	Approved By	Gabriel R. Singson, CEO, ODVI

01 Purpose

This policy establishes the framework for how departments acquire AI tools, manage budgets, and measure return on investment under ODVI's mandate for AI adoption and transformation.

This policy adopts a **decentralized ownership model**. Each department or business unit is responsible for acquiring and managing its own AI subscription. AI tools are team assets, not centralized IT resources.

02 Scope

This policy applies to:

- 1 All departments and business units under ODVI
- 2 All AI tools and subscriptions used for operational purposes
- 3 All budget requests related to AI tooling

03 Budget Approval Process

3.1 Request Submission

The department identifies a need and submits a request containing: purpose and justification, proposed use case, expected outputs and ROI, and estimated cost with charge code.

3.2 Review and Approval

Rafael Norman M. Morales reviews all requests for alignment with organizational goals, budget availability, and strategic fit. Approved requests are signed off by Gabriel R. Singson, CEO, ODVI.

3.3 Cost Allocation

After approval, the request is forwarded to the BU head or designated costing officer for budget allocation and charge code assignment.

3.4 Tool Recommendations

Departments may consult with DTT or Morales for tool recommendations. The default general-purpose recommendation is **Claude Code** — a cost-effective AI assistant supporting document writing, coding, analysis, and workflow automation.

04 Return on Investment (ROI)

Departments are expected to demonstrate ROI from AI tooling. Acceptable ROI metrics include:

- 1 Time saved on manual processes
- 2 Errors reduced or eliminated
- 3 Manual steps automated
- 4 Workflows made more efficient
- 5 Applications, tools, or systems built

During the learning stage, exploration, experimentation, and demonstrated effort also count as progress. Teams showing consistent learning and genuine effort are considered on track, even if hard ROI metrics are not yet fully realized.

05 Compliance

Departments must:

- 1 Maintain a record of all AI tools and subscriptions in use
- 2 Report outputs and progress as required by leadership
- 3 Comply with data privacy and security policies when using AI tools
- 4 Ensure authorized team members complete required onboarding and training

06 Non-Compliance

Failure to comply with this policy may result in:

- 1 Suspension of AI tooling budget
- 2 Requirement to resubmit all active subscriptions for review
- 3 Escalation to executive leadership

07 Policy Review

This policy will be reviewed annually or as needed based on organizational changes, technological developments, or feedback from departments.

Approval

Approved By	Title / Role	Date	Signature
Gabriel R. Singson	CEO, ODVI	May 15, 2026	

This policy supersedes all previous informal guidance on AI tooling and budget.