

Best Practices

- 1. Human judgment comes first.** AI can help create a first draft, summary, outline, or idea list. A person is still responsible for the final work.
 - 2. Protect confidential information.** Do not enter sensitive association, member, financial, personnel, legal, or strategic information into public AI tools.
 - 3. Check everything.** AI can sound confident and still be wrong. Always review AI-generated content for accuracy, completeness, tone, and context.
 - 4. Use AI to support the mission.** AI should help us serve members, improve operations, communicate more clearly, or reduce unnecessary staff burden.
 - 5. Be transparent when needed.** Be prepared to explain how AI was used, especially for public-facing, leadership, board, or member-facing work.
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Good Use of AI

These are generally appropriate as long as you review the output. Remember: AI output is a draft, not a final product. You may use AI to help:

- Member records
 - Personal contact information
 - Financial data
 - Credit card or payment information
 - Health-related information
 - Certification or exam data
 - HR or personnel records
 - Legal documents
 - Contracts
 - Confidential board materials
 - Donor information
 - Sponsor or customer records
 - Non-public strategic plans
 - Login credentials or passwords
 - Proprietary research
 - Unpublished reports
 - Internal emails containing sensitive information
 - Any information the organization would not want shared outside its systems
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Uses that Need Approval First

Ask your supervisor or the designated AI owner before using AI for.

- Member-facing advice or recommendations
- Legal, HR, financial, or compliance-related content
- Personalized member communications
- Survey analysis involving sensitive comments
- Board or committee materials
- Public reports
- Grant or sponsorship materials
- Certification, credentialing, or assessment content
- Any work involving confidential or sensitive data
- Any use that requires uploading organizational data
- Any paid AI tool purchase
- Any tool that connects to association systems

A simple test: **Would it create a problem if this input became public?** If yes, do not enter it.

Uses That Are Not Allowed Without Formal Review

Do not use AI to:

- Make employment decisions
- Make eligibility, certification, or credentialing decisions
- Make financial decisions
- Replace legal, HR, financial, clinical, or compliance review
- Generate final expert advice
- Impersonate staff, members, volunteers, or leaders
- Create misleading, fabricated, or unsupported content
- Upload confidential data to unapproved tools
- Publish AI-generated content without human review
- Create final member-facing answers without approval
- Make decisions that affect a person's access, status, benefits, or opportunities

Before You Use AI, Ask Yourself

1. Am I entering confidential or sensitive information?
2. Would I be comfortable if this input became public?
3. Is this an approved tool for this type of work?
4. Does the output need expert review?
5. Could an error confuse members or damage trust?
6. Does this need a citation, source, or fact-check?
7. Am I using AI to support my judgment, not replace it?
8. Should my supervisor know AI was used?
9. Is this internal-only, or will members, volunteers, partners, or the public see it?

10. Do I understand the risk if the AI output is wrong?

If you are unsure, stop and ask.

How To Review AI Output

Before using anything AI creates, check for:

1. **Accuracy.** Are the facts correct? Are names, dates, numbers, links, and claims accurate?
 2. **Completeness.** Is anything important missing?
 3. **Tone.** Does it sound like our organization?
 4. **Context.** Does it understand our members, programs, policies, and relationships?
 5. **Bias.** Does it make assumptions about people or groups?
 6. **Confidentiality.** Did the prompt or output include information that should not be shared?
 7. **Source quality.** Does this need a real source, citation, or staff verification?
 8. **Human accountability.** Would you be comfortable standing behind this work?
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Suggested Disclosure Language

Use this when AI materially helped draft, summarize, organize, or analyze work that will be reviewed by leadership, used with members, or included in formal materials:

AI was used to support drafting, summarization, or organization of this material. Final review, judgment, and approval were completed by humans.

For informal internal drafting, disclosure may not be needed unless your supervisor asks for it.

Red Flag Situations

Pause before using AI if:

- You are working with sensitive data
- The content involves legal, HR, financial, clinical, or compliance issues
- The output will go directly to members
- The material will be reviewed by the board
- The content involves certification, credentialing, or assessment
- The AI tool asks you to upload files from internal systems
- The AI output includes facts you cannot verify
- The AI creates quotes, sources, statistics, or citations you did not provide
- You are using a personal account for work
- You are unsure whether the tool is approved



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