CUTTING THROUGH THE CHAOS

AI Privacy Checklist for Non-Profits

COVE CONSULTING

Use AI with confidence, without putting your members, donors or volunteers at risk.

1 Know what never goes in

If you wouldn't post it on your website, don't paste it into AI.

- ☐ Names with contact details of members, donors, volunteers or clients
- ☐ Donor amounts, banking details or anything financial about a person
- ☐ Health, family or personal situations someone shared with you in confidence
- ☐ Board in-camera notes, HR issues and staff performance
- ☐ Information or photos of children
- ☐ Passwords, logins and account numbers

2 Remove names before you paste

- ☐ Swap names for roles: "a long-time volunteer," "a major donor," "a mature family member"
- ☐ Delete emails, phone numbers and addresses from anything you paste in
- ☐ For a mailing list or spreadsheet, keep the names in your own system and ask AI only about the structure

3 Change your settings

Most tools let you stop your chats being used to train their AI. Menus move, so if you can't find these, search the tool's help page for "training" or "data controls."

- ☐ **ChatGPT:** Settings, Data controls, turn off "Improve the model for everyone"
- ☐ **Claude:** Settings, Privacy, turn off "Help improve Claude"
- ☐ **Gemini:** turn off Gemini Apps Activity (also called Keep Activity) in your Google account

- [ ] **Muse and other new tools:** look for a privacy or data setting before you use it for work. If you can't find one, treat anything you type as public.
- [ ] Better still for teams: a business or non-profit plan, where your chats aren't used for training by default. Registered charities can get big discounts (see the prices slide in the replay).

4 Connect carefully

AI agents can read your email, calendar and messages. That's what makes them useful, and why they need guardrails.

- [ ] Connect one account at a time, and read the permissions before you click Allow
- [ ] Set it to draft only: it writes, you review, you press send
- [ ] Never let it post, send or pay for anything without your OK
- [ ] Disconnect when you're not using it, and reconnect when you need it
- [ ] Use your work account, not your personal one, for organization business

5 Permission first, always

- [ ] **CASL:** email only people who said yes, identify your organization and always include an unsubscribe link
- [ ] Ask before you use anyone's photo, story, words or recording
- [ ] Recording a meeting? Tell everyone and ask first
- [ ] Getting AI to turn an interview into a post? Show the person the final version before it goes out

6 Check every answer before it goes out

- [ ] AI can be confidently wrong about names, dates, past winners and numbers
- [ ] Ask it: "Check your work and show me anything you're unsure of."
- [ ] Read it out loud. If it sounds like a robot wrote it, rewrite it.
- [ ] For facts that matter, check the source yourself. You're the editor. AI is the first draft.

7 Get your team on the same page

Many organizations have staff using AI "on the side of their desk" with no shared rules. A one-page AI policy fixes that. It should answer:

- ☐ Which tools are we OK using, and on which accounts?
- ☐ What information is off-limits (start with section 1)?
- ☐ Who reviews AI-assisted work before it goes public?
- ☐ When do we tell people AI helped (for example, in grant applications or published reports)?
- ☐ Who keeps the policy current? Review it every six months, because the tools keep changing.

> **Try this:** "Act as a privacy and governance advisor for a small Canadian non-profit. Draft a one-page AI use policy for our staff and volunteers covering approved tools, information we never share, review before publishing, and when we disclose AI use. Ask me five questions about our organization first." Then take the draft to your board or ED. AI writes the first draft. Your people decide.

Want help building an AI policy or workflow for your team? I offer custom workshops for organizations.

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