

AI Tools and Usage Guidelines

I. Purpose

This policy establishes guidelines for the use of artificial intelligence (AI) tools by [Association Name] staff. It provides clear direction on how to leverage AI effectively while protecting member interests and association data. We recognize AI as a valuable tool that can enhance our ability to serve members while maintaining human expertise and judgment central to our mission.

II. Scope

This policy applies to all employees, contractors, and volunteers using AI tools for association work. This includes but is not limited to:

- Public AI tools (e.g., ChatGPT, Claude)
- AI features within existing software
- Association-specific AI solutions
- AI-powered automation tools

III. AI Tool Access & Accounts

Enterprise Accounts

The following tools have shared team accounts:

- [Tool Name]: Request access from [Position/Department]
- [Tool Name]: Request access from [Position/Department]
- [Tool Name]: Request access from [Position/Department]

Setting Up Individual Accounts

- Use only your association email (@[associationdomain])
- Never use personal email addresses
- Store credentials in [association password manager]

Approved Paid Tools for Individual Accounts

- [Tool Name]
- [Tool Name]

- [Tool Name]

Approved Free Tools for Individual Accounts

- [Tool Name]
- [Tool Name]
- [Tool Name]

Requesting New AI Tools

To request a new AI tool be added to our approved list:

1. Submit request to [Position/Department] including:
 - Tool name and website
 - Business justification
 - Whether paid or free
 - If paid, estimated cost
 - Intended use cases
2. [Position/Department] will evaluate:
 - Security requirements
 - Integration needs
 - Cost considerations
 - Overlap with existing tools
3. Expect response within [timeframe]

Adding Approved Tools

If approved:

- Tool will be added to appropriate list (paid/free)
- Staff will be notified of new addition

IV. Decision Framework: Traffic Light System

Green Zone (Proceed Independently)

Use AI freely for these activities after reading this policy:

- Writing first drafts of internal documents
- Generating ideas and outlines
- Analyzing publicly available data
- Creating basic templates
- Proofreading your own work
- Summarizing public information
- Basic research tasks

Required for Green Zone:

- Review output before using
- Keep human judgment in the loop

Yellow Zone (Check with Supervisor)

Get supervisor approval before:

- Creating member-facing content
- Working with aggregated member data
- Developing educational resources
- Processing survey data
- Automating routine processes
- Creating public communications

Required for Yellow Zone:

- Email supervisor with intended use
- Document how AI will be used
- Have plan for human review
- Save copies of important outputs
- Include appropriate AI disclaimers

Red Zone (Formal Approval Required)

Never proceed without formal approval for:

- Handling individual member data
- Processing financial information
- Creating official statements
- Working with certification content
- Making member decisions
- Handling confidential information
- Creating legal documents

Required for Red Zone:

- Submit written request to [Designated Authority]
- Wait for documented approval
- Follow specified safety protocols
- Maintain detailed usage logs
- Include appropriate AI disclaimers

V. Data Protection

Never Input into AI Tools:

- Member contact information
- Individual member data
- Financial records
- Private correspondence
- Access credentials
- Confidential documents
- Personnel information

Safe to Use with AI:

- Public information
- Anonymized aggregate data
- Published materials

- General industry content
- Non-confidential internal documents

VI. Quality Control

Required Review

For all AI-generated content:

- Verify factual accuracy
- Check for appropriate tone
- Ensure policy compliance
- Confirm no confidential data
- Review for completeness
- Add required disclaimers

Documentation

Maintain basic records of:

- Which AI tools you're using
- Key outputs saved
- Approvals received
- Any issues found

VII. AI Use Disclaimers

When Disclaimers Are Required

Must include an AI disclosure when:

- Publishing member-facing content created with AI
- Distributing AI-assisted educational materials
- Sharing AI-generated analysis or insights
- Using AI to substantially edit member content
- Creating resources with significant AI input

Standard Disclaimer Language

Use one of these approved statements:

- "This [document type] was developed with AI assistance and human review."
- "AI tools were used in the creation of this content under staff supervision."
- "Some content in this publication was generated with AI assistance."
- "This resource was developed using AI tools with expert review and validation."

Disclaimer Placement

Include disclaimers in:

- Document footers
- Email signatures when relevant
- Resource landing pages
- Program materials
- Newsletter mastheads
- Educational content

VIII. Training Requirements

Ongoing Requirements

- Review policy updates when issued
- Complete required AI training from [Association Name]

IX. AI Learning & Collaboration

Knowledge Sharing Hub

Join our AI learning channel:

- AI Discussion Channel: [Insert Link to Teams/Slack channel]

Building Best Practices

Share your experiences in [AI Discussion Channel]:

- Post your AI wins and lessons learned
- Share effective prompts that worked well
- Discuss challenges and solutions

- Help colleagues learn new applications
- Document creative uses of AI tools

Collaborative Learning

Active participation helps everyone improve:

- Ask questions in [AI Discussion Channel]
- Share interesting AI developments
- Post before/after examples of AI assistance
- Highlight time-saving workflows
- Discuss impact on [association name] work

X. Getting Help

When to Ask

- Unsure which zone applies
- Questions about data usage
- Need help with new tools
- Concerns about outputs

Who to Ask

- AI tool and usage questions: [Position/Department]
- Security concerns: [Position/Department]

XI. Policy Violations

Not following this policy may result in:

- Loss of AI tool access
- Additional training requirements
- Disciplinary action
- Review of access privileges

XII. Updates

This policy will be reviewed quarterly and updated as needed. Staff will be notified of all updates.

Acknowledgment

I have read, understand, and agree to follow this AI Usage Policy.

Name: _____

Date: _____

Signature: _____