



GOVERNANCE WORKSHEET

AI Acceptable Use Position

A one-page position your board can adopt, and the questions to ask any vendor

BOARD TOOL

3 PARTS

12 VENDOR QUESTIONS

REUSABLE

HOW TO USE THIS

Written once, reviewed twice a year

Organizations tend to answer this in one of two ways, and both fail. A blanket ban, which staff quietly ignore while the work still has to get done. Or silence, which is a blanket permission nobody wrote down and nobody can be held to. This document is the middle path.

How it gets written

01 Name what the tools are for

The tasks where staff may use them, in your words rather than a vendor's. Specific permission is what makes a red line credible.

02 Draw the red lines

The categories of information that must never be entered, listed explicitly enough that nobody on your staff has to interpret them.

03 Name who checks

Any output reaching a client, a funder, or the public is reviewed by a person who is accountable for it. The tool is never the last step.

04 Decide what you disclose

What you tell the people you serve, your funders, and your board. Deciding now is far easier than explaining later.

A starting list of red lines

Adapt these to your programs. Add to them; do not quietly subtract.

- × Names and contact details of people you serve
- × Immigration or citizenship status
- × Health, behavioral health, or substance use information
- × Safety details and addresses of people at risk
- × Social Security numbers and government identifiers
- × Financial account, benefit, or payment details
- × Case notes, intake narratives, and incident reports
- × Anything disclosed to you in confidence
- × Unpublished personnel, legal, or board matters

BEFORE YOU ADOPT IT

This is a starting point, not legal advice. HIPAA, 42 CFR Part 2, FERPA, state privacy law, and your own funder agreements may impose stricter requirements than anything listed here. Confirm your obligations with counsel before adopting a position.

THE POSITION

One page, adopted by the board

Complete each section. Keep it to this page.

ORGANIZATION _____ ADOPTED _____ OWNER _____ REVIEW BY _____

01 Permitted uses

The tasks where staff may use an approved tool.

02 Red lines

Information that must never be entered into any general tool.

03 Review

Who checks output before it reaches anyone outside the organization.

04 Disclosure

What we tell clients, funders, and the board about our use.

05 Approved tools

Which products are cleared, and who decides when that changes.

Signed by the person accountable for this position, not by the person who drafted it. Review it on the date above whether or not anything has changed, because these tools will have.

VENDOR QUESTIONS

Twelve questions, and what to listen for

Ask all twelve before signing anything. The answers that matter are specific and written down; a reassuring answer that cannot be pointed to in a contract is not an answer.

01 Do you train your models on what we put in?

A clear no, written in the contract, not buried in a settings page.

02 Can training be turned off, and is it off by default for us?

Off by default on our plan, confirmed in writing.

03 How long do you keep our inputs and outputs?

A stated number of days, not “as long as necessary.”

04 Can we delete our data, and how quickly?

A deletion we can trigger ourselves, with a deadline attached.

05 Where is our data stored and processed?

Named countries. Some funders and contracts care a great deal about this.

06 Who at your company can see our content, and when?

Named roles, access logging, and the specific circumstances.

07 Do you use subprocessors, and who are they?

A published list, and notice to us before it changes.

08 Will you sign a business associate agreement?

Yes, wherever health information is involved. A no ends that use case.

09 What happens to our data if we stop paying, or you are acquired?

An export path and a deletion commitment that survives the change.

10 What is your security posture, and can you show it?

SOC 2 Type II or equivalent, dated within the last year.

11 What does the tool do when it does not know something?

An honest answer about error rates and whether sources are cited.

12 What does this cost at our real volume in year two?

The renewal price, not the pilot price.

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