



ARTIFICIAL INTELLIGENCE USAGE POLICY ON CORPORATE-OWNED AND NON-CORPORATE ISSUED DEVICES

Policy Statement

This policy establishes guidelines for the responsible use of artificial intelligence (AI) tools by Community Foundation of Greater Memphis staff. Our goal is to embrace AI as a productivity tool that supports our mission, while ensuring our use of it upholds our commitment to donor trust, data privacy, content integrity, and the values that define our work.

This AI policy is essential to ensure that artificial intelligence tools are used responsibly, ethically, and in alignment with our values of community, fairness, partnership and collaboration, impact, stewardship, transparency, service, equity and inclusion, accountability, and honesty. Our use of AI tools must also reflect these values. This policy exists not to limit the use of AI, but to ensure we use it thoughtfully, consistently, and in a manner worthy of the trust our donors, grantees, and community partners place in us.

The foundation prioritizes recognizing and addressing bias in grant-making and funding decisions, protecting donor and grantee privacy, maintaining transparency about AI's influence on philanthropic decisions, and ensuring equitable access to foundation resources regardless of stakeholders' technical capacity. Periodic reviews of AI-generated content and tools are conducted to identify and mitigate potential bias in language or recommendations. Staff training is provided on recognizing and mitigating AI bias, and AI vendors are selected based on their demonstrated commitment to fairness and bias mitigation.

This policy applies to all staff, contractors, and volunteers who use AI tools in the course of their work for the Community Foundation, whether on foundation-owned or personal devices.

Approved Tools

The Community Foundation has approved the following AI tool(s) for staff use:

- **Claude** (Anthropic) -primary approved tool for drafting, editing, research support, and meeting/training assistance

Use of other AI tools (including ChatGPT, Gemini, Copilot, or others) requires prior approval from the Chief Operating Officer. Staff should not use unapproved tools for foundation work without explicit authorization.

If you are unsure whether a tool is approved, ask the Chief Operating Officer before using it.

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Procedures

AI tools may be used to support a wide range of foundation work, including but not limited to:

Communications & Marketing

- Drafting and editing donor communications, newsletters, social media content, and press materials
- Adapting content for different audiences or formats
- Proofreading and improving clarity and consistency with the Community Foundation's voice

Philanthropic Services

- Drafting acknowledgment letters, stewardship updates, and donor correspondence
- Preparing talking points or FAQs for donor interactions
- Summarizing fund history or impact information for letters and reports
- Researching publicly available information about funders or prospects
- Drafting outreach emails and follow-up communications

Community Impact

- Drafting and editing nonprofit communications, newsletters, and social media content
- Drafting grant cycle calendars and schedules
- Proofreading grantee reports and stories

Trainings & Meetings

- Creating agendas, training outlines, and presentation structures
- Drafting speaker notes, discussion questions, and facilitation guides
- Summarizing meeting notes or turning action items into follow-up communications

General Productivity

- Drafting internal memos, reports, and documentation
- Summarizing long documents
- Brainstorming and idea generation

Donor Data & Confidentiality

This is the most critical area of this policy. Staff must exercise care when using AI tools in relation to donor and nonprofit information and other confidential foundation data. The trust of our donors and community partners is foundational to our work and must be protected at all times.

Do not enter the following into any AI tool:

- Donor names, addresses, phone numbers, or email addresses
- Specific gift amounts tied to identifiable individuals or families
- Fund terms, agreements, or legal documents
- Board or committee member personal information
- Grantee financial or application data that is not publicly available
- Any information covered by the Community Foundation's confidentiality agreement

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Instead, describe situations generally. For example:

- Instead of: *"Write a letter for John and Mary Smith who gave \$50,000..."*
- Write: *"Write a letter for a longtime donor couple who made a major gift to establish a scholarship fund..."*

Staff who inadvertently enter confidential information into an AI tool should notify the Chief Operating Officer immediately.

Completely anonymized data may be entered into Claude for the purpose of data analysis. It is the staff person's responsibility to ensure that absolutely no identifying information is included.

Note: Anthropic's data practices for Claude can be reviewed at www.anthropic.com/privacy. Staff are encouraged to familiarize themselves with how prompts are handled.

Content Review & Approval

AI-generated content must be reviewed by a staff member before it is sent, published, or used externally. The following standards apply:

All AI-assisted content must be:

- Read and edited by the staff member responsible for the communication
- Verified for factual accuracy, especially names, dates, figures, and program details
- Consistent with the Community Foundation's voice, values, brand standards, and commitment to equity and inclusion
- Appropriate for the intended audience and relationship

A note on equity and values alignment: Staff should pay particular attention to ensuring that AI-generated content, especially content addressing community issues, grantmaking, or the Community Foundation's community investment work, accurately reflects our commitment to equity, inclusion, and partnership. Claude does not automatically write with these principles unless prompted to do so.

Any higher scrutiny work, including donor correspondence, grant reports, board materials, community investment communications, and public-facing publications must go through the Community Foundation's normal review and approval process regardless of whether AI was used in drafting.

Staff should never send AI-generated content without reading it in full. Claude can produce confident-sounding text that contains errors. You are the expert; the AI is the drafting assistant.

Disclosure

At this time, the Community Foundation does not require staff to disclose AI assistance in routine internal or donor communications. This may be revisited as norms evolve. When in doubt, use your judgment about whether disclosure is appropriate given the context and relationship.

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Responsible Use Standards

All staff are expected to use AI tools in a manner consistent with our mission, vision, and values.

Staff should not use AI tools to:

- Generate content that is misleading, discriminatory, or misrepresents the Community Foundation or its community partners
- Produce content that conflicts with our commitment to equity, inclusion, and the fair treatment of all Mid-Southerners
- Circumvent normal review, approval, or compliance processes
- Make or communicate decisions that require human judgment and accountability (e.g., grant awards, employment decisions, legal matters)
- Replace our own voice, perspective, or expertise
- Create content on behalf of external individuals or organizations without authorization
- Use AI tools for frivolous reasons as we know the environmental impacts of AI may be damaging

Staff should:

- Apply their own professional judgment to every AI-assisted output
- Maintain their skills, expertise, and community relationships - AI is a supplement, not a substitute
- Ensure AI-generated content reflects the Community Foundation's values and does not inadvertently perpetuate bias or inequity
- Raise concerns about AI use with their team lead or Chief Operating Officer

Accountability & Compliance

Each staff member is responsible for their own use of AI tools in accordance with this policy. Managers are responsible for supporting their teams in understanding and following these guidelines. This includes the values of accountability and transparency that guide all of our work.

Violations of this policy, particularly around confidential data, may result in corrective action in accordance with CFGM's personnel policies.

Questions & Evolving Guidance

AI tools and best practices are evolving rapidly. This policy will be reviewed at least annually and updated as needed. Staff are encouraged to bring questions, observations, and suggested updates to their team lead. We are committed to learning and adapting our practices as this technology and its implications develop.

Acknowledgment

By using AI tools in their foundation work, staff acknowledge that they have read, understood, and agree to follow this policy.

STAFF MEMBER

DATE