degasystems

AI Do's & Don'ts for Non-Profits

Protecting clients, donors, cases, and your organization's integrity

✗ Don'ts

Don't share client case files
Solicitor-client privilege doesn't auto-delete from an AI.

Don't paste donor/member lists
Their privacy isn't a data point for training.

Don't upload beneficiary information
PII breaches = mission damage + liability.

Don't share grant proposals or financials
Competitors don't need to see your strategy.

Don't paste trial documents or litigation strategy
The other side won't appreciate the help.

Don't connect work email to free AI tools
Your org's data isn't a lab experiment.

Don't use personal accounts for org work
There's no audit trail when things go sideways.

Don't trust unvetted connectors to case management
One rogue integration = compliance nightmare.

Don't paste client communications unredacted
Names, case numbers, everything—anonymize first.

Don't skip security training
Your mistake = your org's legal exposure.

✓ Do's

Do redact client and beneficiary names
Keep it anonymous: 'Client A' beats 'John Smith.'

Do turn off model training
Settings > Privacy > opt out of training your competitors.

Do use your org's approved AI tool
Your legal/compliance team approved it for a reason.

Do strip metadata from documents
Comments, tracked changes, author names—all gone.

Do run the 'would this breach confidentiality' test
If you wouldn't read it aloud in court, don't paste it.

Do anonymize grant data before analysis
Remove funder names, org details, dollar amounts.

Do use separate, secure workspaces
One workspace per engagement or program.

Do document your AI usage policy
Write it down. Get board/leadership sign-off.

Do audit AI outputs before sharing
Check for hallucinations, leaked context, bias.

Do get legal to review first
When in doubt, ask compliance before hitting Send.

Questions? Reach out to us