ai4

Green, Yellow, Red: A Staff Guide to AI Tools and Supporter Data

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General AI assistants help with drafting and planning. Supporter records need an approved tool with a contract behind it. Share this guide with every staff member and volunteer.

Zone	What it covers	Examples
Green: go ahead	General work with no supporter data in the prompt	Brainstorm event themes, tighten public copy, outline a presentation, rewrite a generic appeal
Yellow: strip details first	A real situation, with every identifying detail removed	Remove names, emails, phone numbers, gift amounts, dates, and locations. Watch for combinations that point to one person, such as “our largest donor in Oakville.” Then ask for help with tone or structure.
Red: never	Supporter records in a consumer AI tool	Donor lists, gift histories, contact details, notes on health or family circumstances, exported reports

Red-zone work belongs in a tool your organization has reviewed against the ten vendor questions, with a signed data processing agreement.

About and licence

Prepared by Jason Brown, founder of AI4Love, a relationship intelligence platform for Canadian nonprofits.

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