

The Jonesi Consultancy | Houston, TX

A PRACTICAL STARTING GUIDE FOR MISSION-DRIVEN TEAMS

WHERE AI CAN HELP A NONPROFIT WITHOUT TOUCHING SENSITIVE CLIENT DATA



18 Places to Start When You Serve People Whose Privacy You
Are Responsible For

Build confidence with lower-risk work before you move into sensitive workflows.

WHY THIS STARTING POINT MATTERS

The belief that nothing can happen until enterprise governance exists is costing mission-driven organizations more than the risk they are avoiding.

Nonprofits are right to be cautious. You hold information about people in difficult circumstances, frequently under a legal obligation and always under a moral one. Caution here is not timidity, it is the job. The mistake is concluding that caution means waiting. A large share of the work in any mission-driven organization involves no client information at all, and that work is where the capacity you are short of actually lives. You can begin there today, learn what these tools do and where they fail, and be considerably better prepared for the harder decisions when you reach them.

1 The Line, Stated Once

WHAT STAYS OUT

Client, patient, and case records. Names, addresses, and anything else that identifies a person you serve. Health information. Immigration status. Criminal history. Financial hardship details. Case notes, intake forms, and service records. Anything a participant told you in confidence.

This holds regardless of the tool, the account type, or how careful the prompt is. If you are unsure whether something identifies a person, treat it as though it does.

A Simple Three-Lane Test

GREEN · START HERE

Public information, fictional or synthetic examples, generic templates, non-sensitive planning, and content that can be safely shared outside the organization.

YELLOW · PAUSE + CHECK

Internal information that is not clearly sensitive. Use only approved tools, confirm policy, minimize data, and obtain appropriate review before entering it.

RED · DO NOT PROCEED

Sensitive client or beneficiary data, PHI, PII, confidential donor records, account credentials, restricted financial information, HR personnel details, or client-restricted material in unapproved AI systems.

USE THE LEAST SENSITIVE INFORMATION NECESSARY

Ask whether the task can be completed with public information, a generic template, fictional data, aggregate data, or a sanitized version of the material. If yes, start there. If the task genuinely requires sensitive information, pause until the organization has an approved tool, policy, safeguards, and appropriate review.

2 18 Places to Start

Everything here sits comfortably outside the line. None of it requires you to resolve your governance questions first, and doing it will make those questions easier to answer when you get to them.

FUNDRAISING AND COMMUNICATIONS

1 Draft an appeal letter from your own program description

You supply the program summary and the audience. Nothing about any individual participant is involved.

2 Turn one story into six formats

Once a story has been approved for public use with the participant's consent, adapting it for a newsletter, a social post, and a slide adds no new exposure.

3 Write the first draft of a grant narrative

Programs, methods, staffing, and need are organizational information. The aggregate outcome numbers you already publish are as well.

4 Prepare donor thank-you letters at volume

Names and gift amounts stay in your CRM. Draft the template and merge locally.

5 Rewrite jargon for a general audience

Paste your own published material and ask for a version at an eighth-grade reading level.

6 Generate interview questions for a story you are gathering

Preparing the questions involves nobody's information. What comes back is a separate decision.

PROGRAM AND OPERATIONS

7 Build a training outline for volunteers

Curriculum design uses your policies and procedures, not participant records.

8 Draft a program logic model or theory of change

This is organizational reasoning. Working through it aloud with a model is often faster than a planning retreat.

9 Summarize a long research report or a funder's guidelines

Published documents. Reading them so you do not have to is one of the highest-value uses available.

10 Compare two funding opportunities against your capacity

Both documents are public and your capacity assessment is your own.

11 Draft standard operating procedures for a routine process

Intake scheduling, referral handoffs, and volunteer onboarding described as processes rather than as instances.

12 Produce a plain-language version of a policy for staff

Your own policy, rewritten. Nothing enters that has not already been written down internally.

ADMINISTRATION AND GOVERNANCE

13 Prepare board meeting materials from your own notes
Agendas, summaries, and briefing memos built from organizational information.

14 Draft a job description or an interview guide
Role requirements and competencies. The evaluation of actual candidates is a different matter and belongs to humans.

15 Explain a financial statement to a non-financial board member
Use your published audited figures, or invent representative numbers to illustrate the concept.

16 Build a first draft of an annual report outline
Structure and narrative arc, populated later from your own approved content.

17 Write meeting agendas and follow-up summaries
Internal operational content, provided no participant is discussed by name.

18 Draft an emergency communications template
Scenario planning in the abstract, prepared before you need it.

THE COMMON THREAD

Every item above is work your organization already does, done from information your organization already owns and could publish. That is the test. If the input could appear in your annual report without anyone objecting, it can go into an approved tool.

3 4 Places Not to Start

Case notes and service records

The single highest-risk category and, unhelpfully, the one where staff feel the most time pressure. It is also where the temptation is strongest, which is exactly why the line has to be explicit.

Anything tied to a named participant

Including referral emails, benefit applications, and letters written on someone's behalf. The name is the problem, and removing it is harder than it looks when the surrounding detail is specific.

Hiring, discipline, and performance decisions

Employment consequences require documented human judgment. In some jurisdictions they require disclosure as well. This is not a starting point under any circumstances.

Anything a funder or regulator requires you to attest to

Not because AI cannot help with the drafting, but because you should be confident in your verification habits before you rely on them for something you are signing.

4

Sanitize Before You Prompt

Sanitization means removing or replacing information that could identify a person, expose confidential business information, or reveal protected records. It is not a guarantee that a prompt becomes safe; it is one risk-reduction step that should be paired with approved tools and organizational policy.

CHECK FOR	BEFORE YOU PROMPT
Names + direct identifiers	Remove names, initials, addresses, phone numbers, email addresses, account numbers, IDs, case numbers, and other direct identifiers.
Health + service details	Remove diagnoses, treatment information, case histories, benefits details, service records, or any information that could identify a person receiving services.
Donor + financial details	Remove donor-specific giving history, bank or card information, tax IDs, confidential pledge information, and restricted financial records.
Employee information	Remove personnel records, performance issues, accommodation information, compensation details, disciplinary information, and private HR data.
Credentials + security	Never include passwords, API keys, authentication codes, access tokens, security questions, or internal system credentials.
Proprietary + restricted content	Remove client-restricted material, confidential contracts, unpublished strategy, protected IP, and documents subject to nondisclosure or special handling.

Use Substitutes Instead of Real Records

- › Replace a real client name with [CLIENT A] or a fictional name, and describe the pattern rather than the person: “a participant in their sixties who has been with the program for four months” carries the shape of the situation without carrying the person.
- › Use a fictional composite scenario to develop a template, then apply the template to the real case outside the AI tool.
- › Ask the AI to help you design the structure first, then populate sensitive details manually in an approved system.
- › Replace exact dates, addresses, case numbers, or financial values with placeholders when the specifics are not necessary to complete the task. A number that identifies a single household is still identifying information: round it or leave it out.
- › Use aggregated program data only when the organization has confirmed the aggregation does not expose individuals or restricted information.

SANITIZED DOES NOT AUTOMATICALLY MEAN APPROVED

If information is governed by HIPAA, contractual confidentiality, donor restrictions, employment privacy, state or federal law, grant conditions, or internal policy, removing obvious identifiers may not be enough. Use your organization's approved process and escalate uncertainty before proceeding.

5

Turn a Sensitive Task Into a Safer One

Sometimes the task you most want help with is the one you cannot hand over directly. There is usually a version of it that works: separate the reusable structure from the confidential details.

SENSITIVE VERSION	SAFER REFRAME	HUMAN CHECKPOINT
<i>"Write a thank-you letter to Maria Lopez for her \$5,000 gift and reference her prior donations."</i>	"Draft a warm donor thank-you template for a major gift. Leave placeholders for name, amount, giving history, and specific program impact."	A staff member adds the donor-specific details in the CRM or approved document after reviewing the template.
<i>"Summarize this client case note and recommend next steps."</i>	"Create a neutral case-summary template with sections for presenting issue, actions taken, unresolved needs, risks, and follow-up."	Qualified staff complete and interpret the real case using the organization's approved systems and professional judgment.
<i>"Use these beneficiary records to write our grant impact story."</i>	"Draft a grant-impact narrative structure using public program goals and fictional examples. Include placeholders for verified outcome data."	Staff insert validated aggregate data and approved stories only after source review and consent requirements are satisfied.
<i>"Read these employee evaluations and tell me who is underperforming."</i>	"Create a manager reflection checklist for reviewing performance fairly and consistently, without using employee records."	The manager evaluates actual performance using authorized HR processes and remains responsible for any employment decision.
<i>"Review our donor spreadsheet and tell me who to ask for more money."</i>	"Create a donor stewardship segmentation framework using hypothetical characteristics such as engagement level, giving frequency, and campaign participation."	Fundraising staff apply the framework within approved systems and determine outreach based on policy, relationship context, and human judgment.

DESIGN THE TEMPLATE WITH AI. APPLY THE SENSITIVE DETAILS OUTSIDE AI.

For many nonprofit tasks, AI does not need the confidential record to provide value. It can help design the outline, checklist, rubric, message structure, or workflow logic first. Humans then apply that structure to sensitive information inside the organization's approved environment.

BEFORE REFRAMING A TASK, ASK

- › What part of this task actually requires the sensitive information?
- › Can AI help with the reusable structure while a person handles the confidential details?
- › Could a fictional or placeholder example produce the same learning or drafting value?
- › Does the final output require professional, clinical, legal, financial, employment, or programmatic judgment that must remain with a qualified human?

A TEST THAT SETTLES MOST CASES

Would you be comfortable if the text you are about to paste appeared in a screenshot outside your organization? If a participant would recognize themselves in it, the answer is no, and no amount of tool configuration changes that.

6 Choosing Your First One

Pick a single task, not a category. The right first task has three properties, and the third is the one organizations skip.

IT HAPPENS OFTEN

A weekly task returns your learning investment quickly. A task you do twice a year teaches you nothing you will still remember the next time.

GETTING IT WRONG COSTS LITTLE

A first draft you were going to revise anyway is the ideal proving ground. Nothing that leaves the building on the first attempt.

ONE PERSON OWNS IT AND WANTS TO TRY

Volunteers outperform assignees by a wide margin at this stage. Find the person who has already been experimenting and give them the task officially.

What to Do With the Capacity

This is the part worth deciding in advance. Time saved in a nonprofit rarely turns into cost reduction, and pretending otherwise makes the case harder to defend. It turns into something more valuable and harder to measure: a grant application you would otherwise have skipped, a donor stewardship call that would not have happened, an hour a case worker spends with a person instead of with a form.

Name which of those you intend before you begin. Capacity that has not been assigned somewhere reliably disappears into a busier week, and then nobody can point to what changed.

The 60-Second Check Before You Use AI

- ☐ Is the information public, fictional, generic, or clearly non-sensitive?
- ☐ If I removed the names, numbers, or case details, could the AI still help me complete the task?
- ☐ Am I using an AI tool that my organization permits for this type of work?
- ☐ Would I be comfortable explaining what I entered into the tool to my supervisor, privacy lead, board, funder, or the person whose information is involved?
- ☐ Have I kept a human responsible for verifying and approving the final output?
- ☐ If I am uncertain whether the data is sensitive, have I stopped and asked before proceeding?

This guide is educational and does not replace your organization's privacy, security, legal, contractual, or regulatory requirements. When internal policy is stricter than the examples here, follow the stricter requirement.

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Working out where your line sits.

We help mission-driven organizations start safely and expand deliberately. AI does not replace people. It elevates them.

