

NONPROFIT AI NOTE-TAKER POLICY CHECKLIST

SET AN ORGANIZATIONAL APPROVAL RULE

- ☐ REQUIRE INTERNAL APPROVAL BEFORE STAFF, BOARD MEMBERS, CONTRACTORS, OR VOLUNTEERS USE ANY AI NOTE-TAKING, TRANSCRIPTION, OR MEETING SUMMARY TOOL FOR ORGANIZATIONAL WORK
- ☐ DECIDE WHO APPROVES TOOLS (E.G., OPERATIONS, IT, DESIGNATED AI REVIEW TEAM, ETC.)
- ☐ MAINTAIN A LIST OF APPROVED, RESTRICTED, AND PROHIBITED TOOLS
- ☐ CONFIRM WHETHER OUTSIDE PARTICIPANTS MAY BRING THEIR OWN AI NOTE-TAKERS INTO YOUR MEETINGS

DECIDE WHICH MEETINGS ARE OFF-LIMITS

- ☐ PROHIBIT OR REQUIRE SPECIAL APPROVAL FOR AI NOTE-TAKERS IN SENSITIVE MEETINGS (E.G., LEGAL, HR, WHISTLEBLOWER, ETC.)

UPDATE THE MEETING RECORDING POLICY

- ☐ DEFINE "RECORDING" BROADLY ENOUGH TO INCLUDE TRANSCRIPTS, SUMMARIES, CHAT LOGS, AUDIO, VIDEO, AND AI-GENERATED NOTES
- ☐ STATE WHO MAY AUTHORIZE RECORDING OR TRANSCRIPTION
- ☐ INCLUDE A BASIC NOTICE AND CONSENT PROCESS FOR RECORDED OR TRANSCRIBED MEETINGS

ALIGN THE AI, PRIVACY, RECORDING, AND RETENTION POLICIES

- ☐ CONFIRM YOUR AI POLICY, PRIVACY POLICY, MEETING RECORDING POLICY, AND DOCUMENT RETENTION POLICY SAY COMPATIBLE THINGS ABOUT AI NOTE-TAKERS
- ☐ MAKE SURE THE PRIVACY POLICY MATCHES WHAT THE TOOLS ACTUALLY COLLECT, STORE, USE, AND SHARE
- ☐ MAKE SURE THE AI POLICY EXPLAINS WHICH DATA MAY NOT BE RECORDED, TRANSCRIBED, UPLOADED, SUMMARIZED, OR STORED IN AI TOOLS
- ☐ MAKE SURE THE RECORDING POLICY AND AI POLICY USE CONSISTENT LANGUAGE FOR TRANSCRIPTS AND SUMMARIES

CHECK RETENTION AND DELETION SETTINGS

- ☐ DECIDE HOW LONG AI TRANSCRIPTS, RECORDINGS, SUMMARIES, AND MEETING NOTES SHOULD BE KEPT
- ☐ CROSS-REFERENCE THE DOCUMENT RETENTION POLICY
- ☐ CONFIGURE TOOLS SO AUTO-DELETE SETTINGS MATCH THE ORGANIZATION'S RETENTION SCHEDULE
- ☐ CONFIRM LEGAL HOLDS OVERRIDE AUTO-DELETE WHEN REQUIRED

PROTECT OFFICIAL RECORDS

- ☐ STATE THAT AI NOTES ARE DRAFTS UNLESS FORMALLY ADOPTED THROUGH THE ORGANIZATION'S NORMAL PROCESS
- ☐ MAKE CLEAR THAT AI NOTES DO NOT REPLACE APPROVED BOARD MINUTES, COMMITTEE MINUTES, INVESTIGATION RECORDS, OR OTHER OFFICIAL RECORDS
- ☐ DECIDE WHETHER AI TRANSCRIPTS FROM BOARD OR COMMITTEE MEETINGS ARE RETAINED, DELETED, OR PROHIBITED

REVIEW AI VENDOR BASICS

- ☐ CONFIRM WHERE THE TOOL STORES DATA
- ☐ CONFIRM WHO CAN ACCESS THE CONTENT
- ☐ CONFIRM WHETHER THE VENDOR USES MEETING CONTENT TO TRAIN AI MODELS
- ☐ CONFIRM WHETHER THE ORGANIZATION CAN DELETE OR EXPORT CONTENT
- ☐ CONFIRM WHETHER THE VENDOR HAS CONFIDENTIALITY, SECURITY, AND BREACH NOTICE COMMITMENTS

THIS CHECKLIST IS DESIGNED AS A PRACTICAL EDUCATIONAL RESOURCE TO HELP YOUR NONPROFIT IDENTIFY COMMON POLICY CONSIDERATIONS RELATED TO AI NOTE-TAKING TOOLS. IT IS PROVIDED BY PORTER LEGAL PLLC AND ANN PORTER LLC FOR GENERAL EDUCATIONAL AND INFORMATIONAL PURPOSES ONLY. IT IS NOT LEGAL ADVICE, DOES NOT CREATE AN ATTORNEY-CLIENT RELATIONSHIP, AND SHOULD NOT BE RELIED ON AS ADVICE FOR ANY SPECIFIC ORGANIZATION, TRANSACTION, OR LEGAL ISSUE. ANN PORTER LLC PROVIDES EDUCATIONAL RESOURCES ONLY; LEGAL SERVICES ARE PROVIDED ONLY THROUGH PORTER LEGAL PLLC UNDER A WRITTEN, SIGNED ENGAGEMENT AGREEMENT.

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WHAT'S NEXT?

You've now identified some of the key policy and governance questions nonprofits should consider before allowing or adopting AI note-taking and transcription tools.

If you checked several boxes—or realized your organization doesn't yet have policies addressing these issues—that's common. AI governance is evolving quickly, and many nonprofits are still determining how these tools fit within their legal obligations and day-to-day operations.

Remember: This checklist can help you identify potential issues, but it can't tell you which legal approach is right for your organization's specific circumstances.

When you're ready to move beyond a checklist and develop policies tailored to your nonprofit, Porter Legal PLLC helps nonprofits navigate governance, compliance, and operational legal issues with practical, organization-specific legal guidance.

Whether you're updating your AI policy, revising your meeting recording practices, evaluating AI vendors, or addressing broader governance questions, I'm here to help. Email me at aporter@porterlegalpllc.com to start the conversation.



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