SHOW ME SUMMIT ON AGING AND HEALTH 2026 | KEYNOTE

Who else is in the room?

Data leakage, AI notetakers, and protecting the people you serve

Avion Bryant | Chief Technology Officer, Stronghold Data

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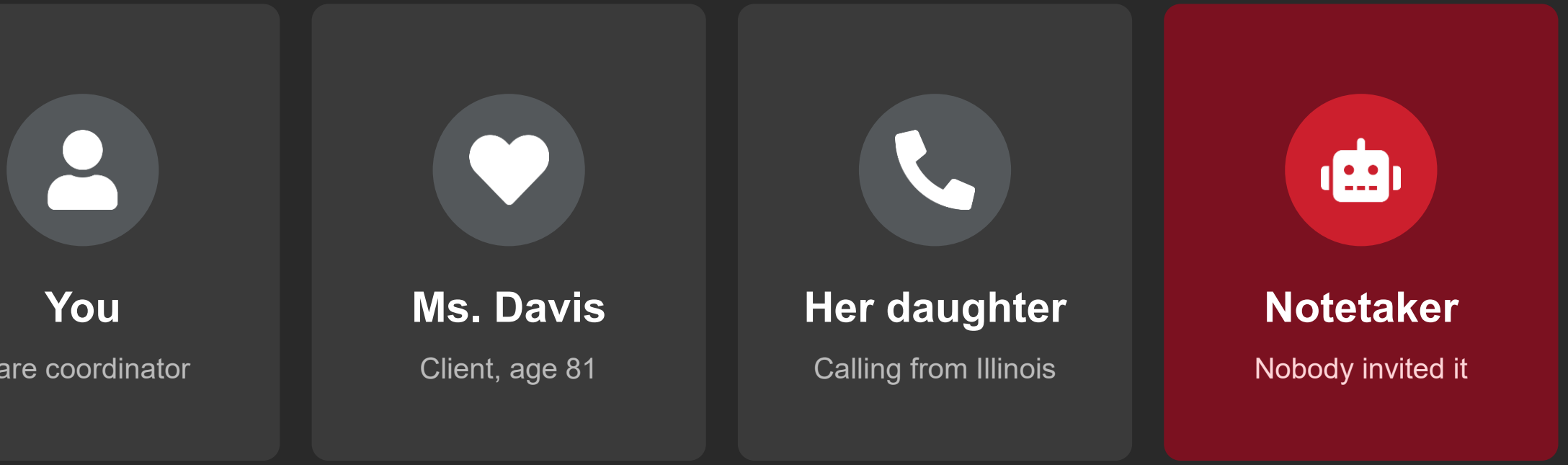
Picture your last case conference



It is recording. It is transcribing. It will email a summary to everyone on the invite.
Where does that summary go next?

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Why a combat engineer talks about data



U.S. Army, combat engineer

Iraq deployment. Instructor at Fort Leonard Wood. The job was simple to say and hard to do: find the hazard before the convoy rolls over it.



CTO, Stronghold Data

A Joplin MSP serving organizations across Missouri and the four-state area. Same job, different road: find where your data leaks before someone else does.

The people you serve are the top target

$7.7B

lost to reported internet crime by Americans age 60 and older in 2025. The highest of any age group.

201,266 complaints filed by people 60+

+59% increase in losses over 2024

$352M lost in senior complaints that referenced AI

Source: FBI Internet Crime Complaint Center, 2025 Internet Crime Report

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Your data is the scammer's script



Leak

A transcript, a spreadsheet, a case note pasted into a free chatbot



Profile

Name, condition, benefits, who lives alone, which agency helps them



Pitch

A call that sounds exactly like your agency, because it uses your details



Loss

Money, safety, and the client's trust in you

In aging services, data governance is elder protection.

01

How data leaks in 2026

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Five ways data walks out the door

AI notetakers

Bots that join, record, and email summaries to everyone on the invite.

Copy and paste

Staff paste case notes into a free chatbot to clean them up or summarize.

Oversharing

"Anyone with the link" files and old shared drives that AI search now finds in seconds.

Connected apps

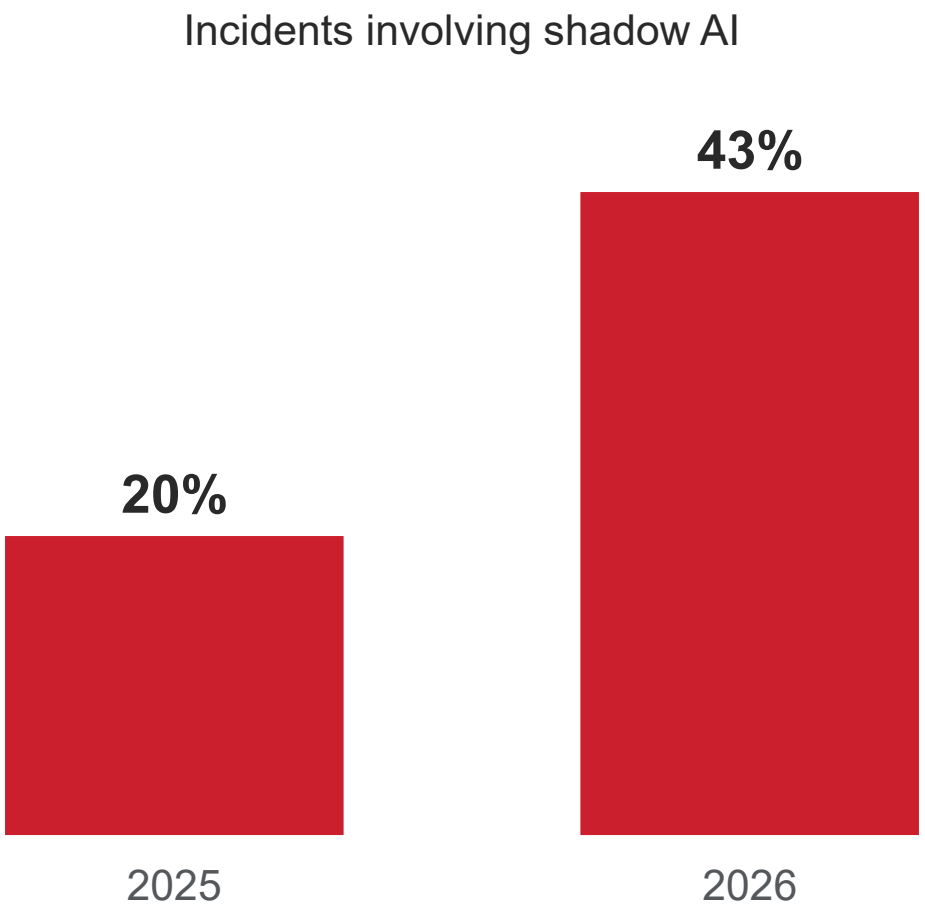
One click on "Allow" gives an outside app your mail, calendar, and files.

Personal devices

Client photos and texts on phones you don't manage. Volunteers included.

None of these feel like a breach when they happen.

Unapproved AI use doubled in one year



1 in 5 shadow AI incidents led to a regulatory fine

~1 in 3 organizations have a strict approval process for AI tools

$6.64M average healthcare breach, the costliest industry 13 years running

Source: IBM and Ponemon Institute, Cost of a Data Breach Report 2026

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02

The AI notetaker problem

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How a bot gets into your meeting

1



One person signs up

Free trial. Connects their work calendar.

2



Tool reads the calendar

Every meeting that person is invited to, internal or external.

3



Bot auto-joins

Including meetings hosted by your partners, providers, and clients.

4



Summary goes out

Stored in the vendor's cloud. Emailed to every attendee.

Nobody clicked "record." One person clicked "connect calendar."

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This is already in federal court

In re Otter.AI Privacy Litigation

What the plaintiffs allege

- The notetaker joined Zoom, Teams, and Meet calls without consent from every participant
- Conversations were used to train the company's AI
- Voice profiles were built without the written consent Illinois biometric law requires

Where it stands

Four proposed class actions filed in 2025 were consolidated in the Northern District of California. In August 2026 the judge refused to dismiss the core claims.

These are allegations, not findings. The lesson holds either way: the tool did what its settings allowed.

Sources: NPR, Aug. 15, 2025; UC Today, Aug. 18, 2026

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Where the transcript goes after the call



Vendor cloud	Kept for how long? Often nobody at your agency knows.
Model training	Allowed by some terms of service, especially free tiers.
Summary email	Sent to every invitee, including outside partners. Forwarded from there.
Searchable archive	Anyone who gets into that account can search every meeting.
Subpoenas and requests	A transcript is a record. It can be demanded later.

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Meetings that never get a bot

Ombudsman work

Resident identity and complaints are confidential under the Older Americans Act. Disclosure needs the resident's consent.

Abuse and exploitation

Case staffing on neglect, abuse, or financial exploitation.

HR and personnel

Discipline, investigations, performance, and medical leave.

Board closed sessions

Executive session, litigation, real estate, and personnel matters.

Your attorney

A third-party recording can put attorney-client privilege at risk.

PHI without a BAA

Any health information when the vendor won't sign a business associate agreement.

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Legal to record does not mean OK to share

Missouri

One-party consent state. One participant can legally record.

Out-of-state callers

Some states, including Illinois and California, require everyone's consent.

Your other duties

HIPAA, Older Americans Act confidentiality, grant terms, and privilege still apply.

The practice

Announce it. Get consent on the record. Offer an opt-out. Turn it off the moment anyone asks.

General information, not legal advice. Confirm specifics with your counsel.

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A notetaker rule your staff can remember



Green: go

- Internal staff meetings
- Approved tool, inside your own Microsoft or Google account
- No client names or identifiers



Yellow: conditions

- Client or partner meetings
- Approved enterprise tool, BAA if health info is discussed
- Announced and consented
- Summary reviewed before it goes out



Red: never

- Anything on the never list
- Free or unapproved tools
- Any bot you didn't invite: remove it, then ask

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03

Governance that fits a nonprofit budget

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Data governance in plain terms



Know it

What data you hold, where it lives, and which tools touch it.



Label it

Sort it into tiers so everyone knows what is restricted.



Lock it

Access, sign-in, and sharing controls that match the label.



Teach it

Short, repeated training for staff and volunteers.

Governance means deciding in advance, so staff don't have to decide in the moment.

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Three tiers for aging services data

Tier	Examples	Rule
Restricted	SSNs, Medicaid and Medicare IDs, health conditions, care plans, ombudsman and abuse case files, home-delivered meal routes	Approved tools only. Never into free AI. No bots in red meetings. Least access.
Internal	Staff schedules, budgets, vendor contracts, internal procedures	Approved tools only. Share inside the organization.
Public	Event flyers, published reports, program descriptions	Any tool. No restrictions.



Why are meal routes restricted? A route sheet is a list of who lives alone, where, and exactly when someone checks on them.

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Give staff a yes, not just a no

Block everything

Staff still have 40 notes due Friday. They use a personal phone and a free chatbot. You lose all visibility.

Approve a safe default

An AI assistant inside the Microsoft 365 or Google Workspace account you already pay for, with enterprise data protection turned on. Visible and governed.

Then write a one-page AI use rule: which tools, which data tier, and who to ask.

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Clean up sharing before you turn on AI

AI assistants find everything a user can access. Including files they never should have had.

Kill "anyone with the link"

on every folder that holds restricted data

Remove departed staff and volunteers

from accounts, shared drives, and Teams

Retire old shared drives and sites

the 2019 intake folder nobody remembers

Apply sensitivity labels

so restricted files are flagged and protected automatically

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Six questions for every AI vendor

1. Do you train your models on our data?
2. Will you sign a business associate agreement?
3. Where is our data stored, how long is it kept, and can we delete it?
4. Do you support single sign-on and multifactor authentication?
5. Which other companies process our data for you?
6. Can our admins control auto-join, recording, and sharing?

If they can't answer in writing, that's your answer.

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Hand this list to your IT partner

Meetings

- Require sign-in to join
- Lobby for outside guests
- Block unapproved meeting bots

Identity

- MFA on every account
- Admin approval for app connections
- Remove access the day people leave

Data

- Sensitivity labels and data loss prevention
- Audit logging turned on
- Tested backups

Don't wait on Washington. The HIPAA Security Rule overhaul is now projected for July 2027. The current rule is enforced today.

HIPAA timeline: HHS regulatory agenda as reported by Fierce Healthcare, 2026

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The human layer

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The voice on the phone may not be real

45%

of AI-driven attacks in 2026 were deepfake impersonation, the largest category.

At your agency

A cloned voice of your director asks finance for an urgent payment. A "vendor" emails new bank details.

For your clients

A grandchild's cloned voice says he's in jail and needs bail money tonight. Don't tell Mom.

The rule

Verify on a second channel. Call back on a number you already have. Families and offices agree on a code word.

Source: IBM and Ponemon Institute, Cost of a Data Breach Report 2026

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Make reporting fast and blame-free

247

days, on average, to identify and contain a breach in 2026. Up for the first time in five years.

"I think I pasted something I shouldn't have." Said in hour one, that sentence saves you a breach notice in month eight.

- One named person to call, posted everywhere
- Thank people who report. Never punish the first report
- Train volunteers, not just staff

Source: IBM and Ponemon Institute, Cost of a Data Breach Report 2026

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Your 30-60-90 day plan

30 days

See it

- Ask staff which AI tools and notetakers they use. No penalties
- Announce the never list for meetings
- MFA on all email accounts

60 days

Decide it

- Sort data into three tiers
- Publish an approved AI list and a one-page rule
- Turn on meeting bot and guest controls

90 days

Prove it

- Vendor review with the six questions, BAAs signed
- Clean up oversharing
- Tabletop drill: a transcript leaked, now what?

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Five things to do Monday morning

1. Check which apps can read your calendar and email. Remove what you don't recognize.
2. Open your next client meeting invite. Who and what is on it?
3. Ask your team one question: "What AI tools are you using?"
4. Pick one never-list meeting type and announce the rule.
5. Call your IT partner and ask what meeting bot controls you have.

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SEIZE THE AGE

The people you serve trusted you with their stories.

Know who else is in the room.

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Q&A

Questions

Avion Bryant | Chief Technology Officer, Stronghold Data

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Sources

- FBI Internet Crime Complaint Center. 2025 Internet Crime Report (published 2026). Losses and complaints for victims 60 and older, AI-referenced complaints.
- IBM and Ponemon Institute. Cost of a Data Breach Report 2026. Shadow AI incidents, regulatory fines, AI approval processes, healthcare breach cost, deepfake share of AI-driven attacks, time to identify and contain.
- In re Otter.AI Privacy Litigation, U.S. District Court, Northern District of California. Coverage: NPR, Aug. 15, 2025; UC Today, Aug. 18, 2026.
- HHS Office for Civil Rights, HIPAA Security Rule proposed rule (Jan. 2025); final action projected July 2027 per the federal regulatory agenda, as reported by Fierce Healthcare.
- Older Americans Act Long-Term Care Ombudsman program rule, 45 CFR Part 1324 (confidentiality and disclosure).
- Missouri Revised Statutes 542.402 (one-party consent to record).