

Artificial Intelligence is Not Coming. *It's Here!* Are You Ready?

Navigating AI in the Aging Services Workplace

Tuesday, November 4, 2026 | 8:45 am – 9:30 am

Presenter: D. Scott Miniea, Executive Director

Missouri Connections for Health/Missouri SHIP

sminiea@moconnectionsforhealth.org

Missouri Connections for Health



Made with GAMMA

You've Already Used AI Today

📧 Email

Spam filters & autocomplete are powered by AI every time you open your inbox

🔍 Search

Every search result & recommendation is shaped by machine learning algorithms

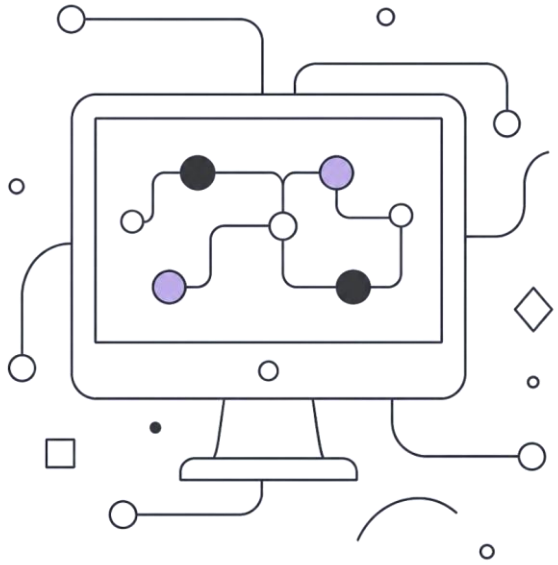
🗓️ Scheduling

Scheduling assistants & chatbots are AI tools already embedded in daily workflows

👥 Your Team

Staff are using AI tools right now—whether leadership knows it or not





What is AI? (No Advanced Degree Required)

Narrow AI

Designed for **one specific task** — ChatGPT, image generators, scheduling tools

Generative AI

Creates **brand-new content**: text, images, code, & analysis on demand

Machine Learning

Systems that get smarter & more accurate the more data they process

Made with GAMMA

Why AI Matters for Aging Services



Staff Shortages & Burnout

AI handles routine administrative work so your team can focus on care



Better Communication

Quicker or better client communication & response times improve service quality



Better Data Analysis

Stronger program outcome reporting & more compelling funding proposals



New Risks

Client data, privacy, & compliance introduce serious risks that must be managed

Made with GAMMA

The Reality: AI is Already in Your Organization

Staff Using ChatGPT

Employees are already using AI for grant writing, emails, and scheduling — with or without a policy

No Policy = No Guardrails

Without formal guidelines, sensitive data is flowing into AI platforms unchecked

Data at Risk

Client health records and financial information are vulnerable to exposure

Compliance violations — including HIPAA and state regulations — are possible right now, without a single intentional act of wrongdoing.



Made with GAMMA



How **Missouri Connections for Health** Built an AI Policy That Works

A real-world example from Missouri Connections for Health (MCH) — an aging services organization providing health insurance benefits counseling & housing support — & how we moved from uncertainty to a clear, actionable AI governance policy.

Made with GAMMA

The Problem We Faced

1

Shadow AI Usage

Staff were already using tools like ChatGPT without organizational awareness or formal approval

2

No Data Guidelines

No rules on what client data or donor information could or couldn't be shared with AI platforms

3

Real Exposure Risk

Client health & benefits information, along with donor data, were at genuine risk of exposure

4

Leadership Decision Point

Leadership needed to decide: embrace AI responsibly with guardrails, or restrict it entirely?

This is not a hypothetical. Organizations across the sector are at this exact crossroads today.

Made with GAMMA



Our Solution: A Practical AI Policy

01

Acknowledge Reality

Recognized staff were already using AI & prohibition wasn't a viable strategy

02

Define Core Principles

Developed 8 principles: protecting people, protecting the mission, minimum necessary data, human accountability, verification, approved tools, transparency, & minimizing unnecessary risk

03

Create Clear Data Rules

Established four data categories — Public, Internal, Confidential, & Highly Sensitive — with specific rules on what can and cannot be entered into AI tools

04

Build Approval & Training Process

Created a management approval workflow & a staff training program rolled out across all levels of the organization

Made with GAMMA



POLICY NAME:	Artificial Intelligence (AI) Use Policy
SECTION:	Information Technology
EFFECTIVE DATE:	July 29, 2026

PURPOSE

AI tools can improve productivity, accessibility, and service quality. As an emerging, disruptive technology, AI is everywhere. Its growth is undeniable, and while most users express both wonder and caution about AI, it remains part of the ecosystem. All small businesses and nonprofits must embrace AI or risk falling behind on the productivity gains and business improvements it enables. In short, AI has attributes that warrant caution, but simply opting out while all concerns are addressed is not an option. Thus, Missouri Connections for Health prefers to develop a policy that recognizes these realities and provides some simple guardrails to guide the use of AI for any official purpose.

This policy enables responsible AI use while protecting:

- Client and colleague privacy
- Confidential organizational information
- The organization's reputation, legal obligations, and intellectual property

SCOPE

This policy applies to all Missouri Connections for Health (MCH) employees, interns, contractors, volunteers, and board members who use organization data or systems. The policy applies regardless of what device or account is used.

POLICY

We *already* use AI. Where?

- Every web browser
- Every smartphone
- Websites (chatbots)
- Many apps
- Read.AI or Otter.Ai or Firefli.ai in meetings/calendars
- Google's Gemini (in Google Workspace, Chrome, etc.)
- Microsoft's Copilot (in Office 365 apps)
- Grammarly

This policy covers AI used for any organization-related work, including:

- Drafting documents, emails, reports, grant narratives, and more
- Summarizing meetings or calls
- Data analysis, spreadsheets, and dashboards
- Translation, transcription, captioning, accessibility supports
- Creating images, slides, marketing materials, or code
- Any AI features embedded in common software

Email me at sminiea@moconnectionsforhealth.org and request a PDF of the document to complement the hard copy you received.

Made with GAMMA

Key Policy Principles: Data Privacy & Security

Never Share

Client PII, case notes, health/benefits details, donor lists, HR info, contracts, or passwords must **never** enter an AI tool

Anonymize First

Remove names, addresses, dates of birth, ID numbers, & any identifying details before using AI for analysis — use **HIPAA Safe Harbor** as your guide

Approved Tools Only

Use organization-approved accounts & enterprise settings; get **management approval** before adopting any new AI tool, especially those that store data or connect to email, CRM, or donor databases

Audit & Verify

Check AI output for accuracy & bias before use; verify facts especially for **legal, benefits, medical, & financial** content

Made with GAMMA

Real Examples: Safe vs. Unsafe AI Use

📧 Client Communication

✅ Safe Use

"Draft a template reminder about benefits renewal" — no client names included

🚫 Unsafe Use

"Summarize John Smith's Medicare benefits & health conditions" — real data exposed to AI

💡 Better Approach

Use AI for templates; staff personalize without ever sharing client data

📝 Grant Writing & Reports

✅ Safe Use

"Help outline a grant proposal on aging in place programs" — no real data shared

🚫 Unsafe Use

Pasting our client outcome data & donor list directly into an AI tool

💡 Better Approach

Use AI for structure & language polish; insert your real data afterward

⚠️ ⚠️ **MCH Policy:** Management approval is required before using any new AI tool with internal or confidential data.

Made with GAMMA

Compliance & Ethical Considerations



HIPAA Compliance

Client health data cannot be shared with third-party AI platforms



State Regulations

Check your state's aging services data protection laws



Bias & Fairness

AI can perpetuate discrimination—review outputs critically



Transparency

Clients & staff deserve to know when AI is being used

Made with GAMMA

Implementation: How We Rolled It Out

01

Leadership Alignment

Leadership aligned on the policy & its purpose, ensuring consistent messaging & support from the top.

02

All-Staff Training

Comprehensive training sessions were conducted for all staff, incorporating real-world scenarios & practical examples to illustrate safe and unsafe AI use.

03

Clear Consequences & Support

Established clear consequences for policy misuse, alongside a supportive framework for learning & continuous improvement.

04

Ongoing Communication & Updates

Maintained ongoing communication channels & committed to regularly updating the policy as AI tools and their capabilities evolve.

Made with GAMMA



Now It's Your Turn!

Let's hear from the room! Your experiences, challenges, & solutions are exactly what this field needs to move forward “better together,” to quote a former Summit theme.

🙋 Share Your Story

Is your organization already using AI? What's working — & what's keeping you up at night?

⚠️ What's Your Biggest Concern?

Data privacy? Staff adoption? Compliance? Leadership buy-in? Let's talk it through.

🚀 What's Your Next Step?

Walk away with one action — a policy draft, a staff conversation, or a tool audit.

Made with GAMMA

Your Role in AI Governance



Policymakers

Set regulatory frameworks & compliance standards



CEOs & leaders

Create organizational policy & allocate resources



Frontline staff

Use AI responsibly & flag risks you encounter



Everyone

Ask questions, share concerns, & stay informed

Made with GAMMA

Key Takeaways

1

AI is here now

Proactive policy beats reactive crisis management.

2

Data privacy & security

Data privacy & security must come first.

3

Clear guidelines

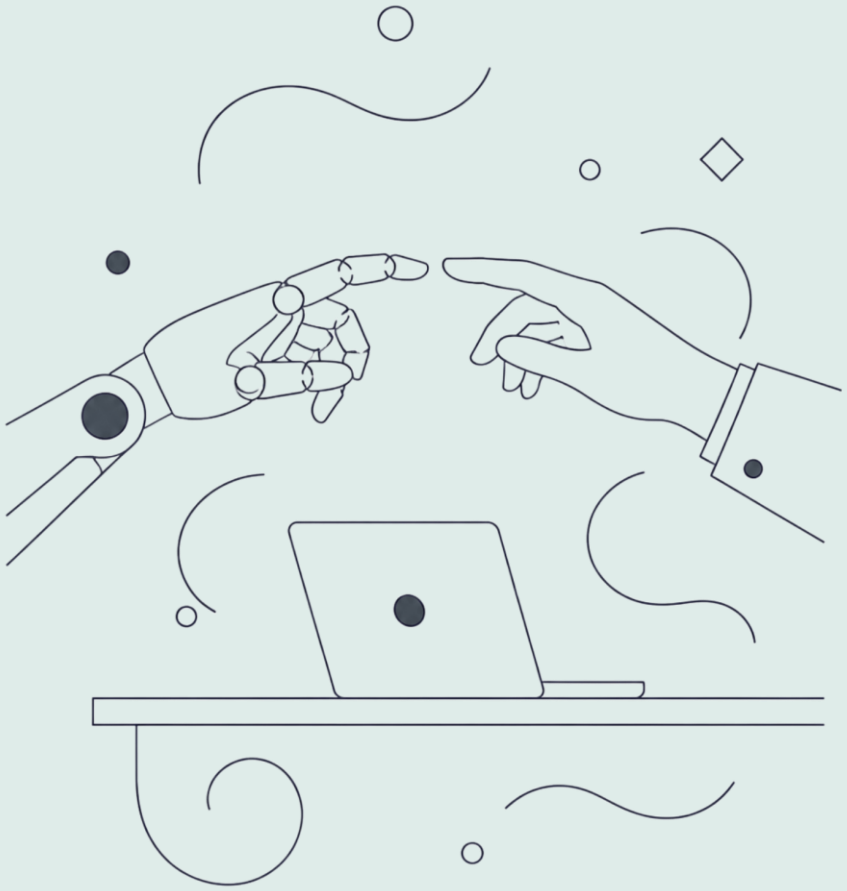
Clear guidelines empower staff to use AI safely & effectively.

4

Your organization's approach

Your organization's approach to AI reflects your values & commitment to clients.

Made with GAMMA



Thanks for your attention & Participation!

Contact Information:

D. Scott Miniea, Executive Director

Missouri Connections for Health/Missouri SHIP

sminiea@moconnectionsforhealth.org

Missouri Connections for Health



Made with GAMMA