



## AOE AI Policy

The AOE team recognizes the potential good and bad AI presents related to how we perform our work and deliver our craft to our clients. Simply, AI is revolutionizing the way we conduct marketing and public relations activities. However, it is imperative that we use this technology in a responsible and ethical manner, as well as in a fashion that is consistent with the AOE brand and high level of standard by which we are known for delivery of our services. To ensure that our team operates in alignment with our values and industry standards, the following policy governs the dos and don'ts related to the use of AI in generating content for our firm and our clients.

*Purpose: This policy outlines guidelines for the responsible and ethical use of generative AI tools by our team when creating content for clients as well as our own internal marketing uses for AOE. It ensures transparency, accuracy, and privacy, while maintaining our clients' reputation and brand integrity.*

### 1. Purpose and Limitations of Generative AI Tools:

- AI tools may be used to generate initial content to enhance efficiency, creativity and productivity in content creation. AI-generated content can include press releases, social media posts, blog posts, articles and other communication materials.
- If AI is used to create the above content, the following best practices should be followed:
  - AI should be used as a source for brainstorming or outlining ideas—the content it generates should **NOT** be considered the final product.
  - **ALL** sources should be verified.
  - The language provided by AI should be altered to project original wording that reflects the unique “voice” of the writer and the organization represented.
- AI tools should **NOT** be used to generate final content. Instead, utilize these tools for brainstorming, outlining and assisting in the creative process. This approach not only safeguards us from potential legal issues but also ensures that human creativity and expertise remain central to our content generation process.
- Approved Scenarios: AI tools are suitable for routine tasks, data analysis and generating drafts. Examples include summarizing news articles, suggesting headlines or creating social media post first drafts.
- Not Suitable Scenarios: AI should not replace human judgment in critical situations, crisis management, or high-stakes content. Always involve human review for sensitive topics, client-specific nuances, and strategic messaging.

### 2. Emphasis on Human Experience and Expertise:

- AOE is known for being experts in the industries we serve. As such, recognize that experience and expertise are paramount in our industry. While AI can aid in various tasks, including preparation for meetings or podcasts, it is essential to remember that understanding and proficiency in the subject matter are why AOE

is so good at what we do. AOE will utilize AI as a tool to enhance our work, not as a substitute for genuine expertise.

- Human Review: All AI-generated content must undergo human review. Team members must verify accuracy, tone, and alignment with client goals.
- Avoid Misleading Information: AI-generated content should not misrepresent facts, create false narratives, or harm client reputation.
- While many large language models have filters to reduce the risk of bias or harmful outputs, it is our responsibility to ensure that content we produce is reviewed for potential bias and developed to be inclusive and accessible.

### 3. **Understanding AI Tools:**

- Take the time to thoroughly understand how AI tools function and where they obtain information. This knowledge enables us to utilize these tools effectively and responsibly, mitigating the risk of disseminating inaccurate or misleading content.
- Educate our clients on our capabilities and expertise related to AI, as well as its limitations, and ethical considerations. Keep abreast of AI advancements and industry best practices.

### 4. **Transparency and Accountability for Content:**

We use AI to assist in some content development at our company. To ensure transparency, accountability, quality and privacy, we adhere to internal AI usage standards. These standards help us safeguard against biases, maintain data security and uphold our commitment to ethical marketing practices. One of these standards is that AI should be used to assist in content creation, not fully automate it. We ensure that every piece of content we develop is shaped and reviewed by people who have an understanding of our audience and AI's limitations. Other standards include:

- Every team member is accountable for the content they produce. This includes ensuring its accuracy, originality and compliance with copyright laws. To this end, it is key that any copy/messaging created using AI is edited to avoid copyright issues. It is recommended that team members conduct a comprehensive search on content before publication to verify its originality and uniqueness. This proactive approach minimizes the risk of inadvertently duplicating existing content or violating copyright regulations. In case of any negative outcomes from AI-assisted content, we must take responsibility and remediate as necessary.

Example: AI is asked which social media platform is the most popular in 2024 and how many people use it each month. AI responds that Facebook, closely followed by YouTube, is the most popular with more than 3 billion monthly active users. A search for confirmation from reputable third parties is required to ensure the information is correct. A quick search on Google leads to a Forbes article which confirms the accuracy of the AI response.

- ### 5. For image alterations using AI as well as Photoshop, Canva or any other image-editing tool, full disclosure will depend on the level of alterations and the intended use.
- Changing color balance, shadows/highlights, brightness and contrast of an image do not require a disclaimer in most scenarios.
  - Edits made purely for aesthetic purposes (e.g., color overlays, duotones, cropping\* or graphical element overlays\*) do not require a disclaimer for social media or other marketing purposes. Images edited in this manner should not be used in press releases or other media-related purposes.

- Removing trash, cigarettes or other minor unwanted elements from an image in a way that doesn't alter the image's messaging does not require a disclaimer for social media and other marketing purposes. However, images altered beyond color changes, shadows/highlights, brightness and contrast should not be sent to media for any purpose.
- Making significant changes to an image that alter the intended message should not be done.

*\* crops or graphic overlays that alter the image's message should be avoided altogether (example: a photo of a jobsite where a construction worker not wearing proper PPE is covered by the company's logo for a social media post about jobsite safety)*

- Whenever AI tools are utilized in the content generation process, AOE team members should promptly inform their supervisor. Transparency regarding the use of AI ensures accountability and enables oversight to maintain the integrity of our work.

#### 5. **Independent Editing and Revision, Commitment to Client and AOE Brand:**

- AOE will NEVER publish or send something that has been written in partial format, or entirely by AI without human development or review for quality and accuracy. After utilizing AI-generated content as a draft, ensure that it undergoes thorough editing and revision. It is crucial to refine the verbiage to align with our firm's tone, style, and messaging. Avoid directly replicating content provided by AI to maintain originality and authenticity in our work.
- AI-generated content should align with the client's brand voice, tone, and messaging guidelines. For content developed for AOE marketing, it should align with AOE branding and voice.
- The following AI tools have been approved for use in our company. DO NOT use any tools outside of those on this list or approved in writing by our security team on company devices or to do company-related work.

1. Jasper
2. Copilot
3. ChatGPT
4. Gemini (formerly Bard)
5. Claude

#### 6. **Protection of Confidential Information:**

We must protect the privacy of our customers, board, employees and other stakeholders. See our list of approved tools with reliable privacy policies and do **NOT** submit customer data into AI tools or LLMs. In addition, we must protect the privacy of our own intellectual property (IP). Sticking with the approved list of tools above will help safeguard both and ensure our data and IP is not used to train publicly accessible large language models (LLM).

- Exercise caution to avoid incorporating any confidential or sensitive information into content generated using AI tools. Protecting the confidentiality of our clients' information is paramount, and AI-generated content should never compromise their privacy or security.

Example: To conduct an analysis of a client's members, AI is provided with the member database. However, to protect the members' privacy, certain information

is removed from the data before providing to the AI tool. These include members names and specific addresses (city and state can remain).

- AI tools should comply with data privacy laws (e.g., GDPR). Ensure that client data remains confidential and is not used for unintended purposes.
- Avoid using specific client data in AI training to prevent accidental disclosure.

## **7. Security, Ethical Considerations and Impersonation**

- AI should not be used to mislead or manipulate clients. All content created using AI should be ethical and in line with our organization's values. AI content should go through a review process by at least two AOE team members including the content owner to check for bias, inaccuracies and other risks. An example of reviewing for accuracy can be found in Section 4 of this document.
- It is our company policy that employees should not use AI to impersonate any person without their expressed permission. AI can allow you to create "in the style" of public figures; as a policy, we do not do that in our company. Designated employees may, with permission and review, use AI to mimic the writing style of a current AOE employee for the purposes of ghostwriting or editing content from that individual.

## **8. Use Cases that Should Not Leverage AI**

While there are many positive use cases of AI assistance in our work, there are specific types of work in which we have decided as a company to restrict the use of AI. Do not use AI for the following:

- Performance evaluations or employee feedback
- Contracts and other legal correspondence
- Other items as identified

## **9. Training Employees on AI Usage**

All employees involved in creating content with AI should receive appropriate training as directed by the AOE President. This should cover both the technical aspects of using AI and the ethical considerations outlined in this policy.

## **10. Best Practices for Implementation**

To practically implement this policy, AOE will always follow these steps:

1. Understand the AI system being used, including how it works and its potential limitations.
2. Ensure that every new hire and existing employee has read this policy.
3. Document the functionality and limitations of the AI system and ensure it aligns with AOE's standards for using the technology as identified in this policy.
4. Continually update our knowledge and training as AI technology evolves.

## **11. Acceptance**

By using AI in our work, AOE employees agree to comply with this policy. By following these guidelines, AOE can harness the power of AI while respecting our clients and upholding our company values.

These guidelines, which will be revisited on a periodic basis and updated accordingly, reinforce our commitment to responsible AI usage, transparency in communication, protection of sensitive information, and maintaining the authenticity of our work. By adhering to these principles, we uphold the trust of our clients and stakeholders, while leveraging AI to enhance the efficiency and effectiveness of our services. AOE's approach to integrating AI into our workflow is rooted in a deep respect for human expertise and a dedication to maintaining the highest standards of professionalism and integrity in our industry.