



Generative AI Meeting Guidelines

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Purpose & Scope

Using generative artificial intelligence (GenAI) technology, automated meeting assistants (aka “AI note takers” or “bots”) have become prevalent in the transcription and summary of online meetings. These assistants may be built into existing collaboration tools used by outside partners such as Zoom or leverage individual licensed software agents, in the case of M365 Copilot.

Although these tools have legitimate uses (e.g., for accessibility and capturing notes for later reference), they can also pose substantial privacy, regulatory, and legal risks, and have the potential to stifle conversation and open inquiry. More details on risks are outlined below.

The following guidelines aim support the transparent, ethical, and secure use of GenAI tools in meetings. These guidelines expand upon the existing [AI Policy](#).

General Risks

- **In all cases:**
 - Creating and distributing AI-generated transcripts and summaries could stifle open conversation and discourage some meeting attendees from fully participating, akin to the video or audio recording of a meeting.
 - Discussion summaries may be inaccurate (e.g., “hallucinations” or missing nuances, sarcasm, irony, and important context).
 - Recorded discussions and summaries/transcripts may be subject to public records request and/or legal discovery in future litigation.
 - Meeting participants may be recorded without their awareness or consent.

- **In the case of AI meeting tools used by a third-party:**
 - Personal and City-County confidential information may be exposed to third parties or used to train AI models, without the necessary contractual protections in place.
 - Discussion content may be preserved indefinitely or shared with third parties, increasing the risks of inappropriate distribution and unauthorized access.

Usage Guidelines

- **Consider the Risk:** Before using M365 Copilot or allowing use of an outside AI assistant in a meeting (or when joining a meeting where an AI assistant is active), carefully consider the risks and ask yourself whether the benefit of using the technology outweighs the risks, taking into account the nature of the meeting.
- **Get Consent:** Before turning recording, transcribing, and Copilot on in a meeting, consent from participants must be given. Below are sample consent scripts:
 - *Before we begin, I want to inform everyone that we will be using Microsoft 365 Copilot during this meeting. Copilot will assist in summarizing key discussion points, suggesting action items, and answering any questions in real-time. Does anyone have any concerns or objections to using Copilot in this meeting?*
 - *Please note that we plan to use Microsoft 365 Copilot to transcribe and summarize this meeting. Please let us know if you have any objections.*
- **Avoid use in sensitive meetings:** Explicitly ask participants to disable AI assistants in meetings involving Critical information (i.e., sensitive nonpublic information, employee performance or employment actions, personally identifiable records, sensitive research, and privileged legal advice). This holds true whether the meeting is hosted by City-County or third-party.
 - Suggested statement in a meeting when sensitive matters arise: *“Given the sensitive nature of this discussion, I suggest that we discontinue the use of AI assistants for the time being. If there are any accessibility needs, please let us know so we can accommodate them.”*
- **Moderate yourself:** If an AI assistant is active in the meeting, be mindful of what you say, with the conservative assumption that your words may be preserved indefinitely.
- **Review and correct summaries, share sparingly, and delete when no longer required:** Prior to sharing M365 Copilot generated meeting summaries, carefully review, correct any errors, then share sparingly on a need-to-know basis. Keep in mind that summaries may include information that was shared before or after certain participants joined the meeting. Include a notice at the top of the document that the summary was prepared by an AI assistant and may contain inaccuracies, along with instructions for how to submit corrections, e.g. *“The meeting notes below were generated by an AI assistant and may contain inaccuracies. Please submit any corrections to the meeting host.”*

Sensitivity to Equity and Access

1. **Inclusive Language:** Use inclusive language and ensure that Copilot-generated content is free from bias.
2. **Content Accuracy:** Evaluate and correct any inaccuracies in AI-generated content that may arise from interpreting communication barriers or language differences.
3. **Equal Opportunity:** Provide equal opportunities for all participants to contribute, regardless of their familiarity with AI tools.

Meeting Settings & Copilot Limitations

Awareness of meeting settings and tool limitations will ensure Copilot is functioning as intended while being mindful of permissions and access.

Meeting Settings

- When using Copilot in meetings, there are a few settings that should be considered particularly in relationship to Copilot functionality. Meeting settings can be reviewed and adjusted under Meeting options menu item in outlook.

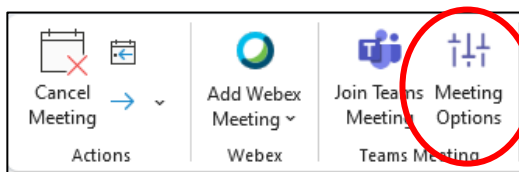


Figure 2 View from Outlook Desktop menu

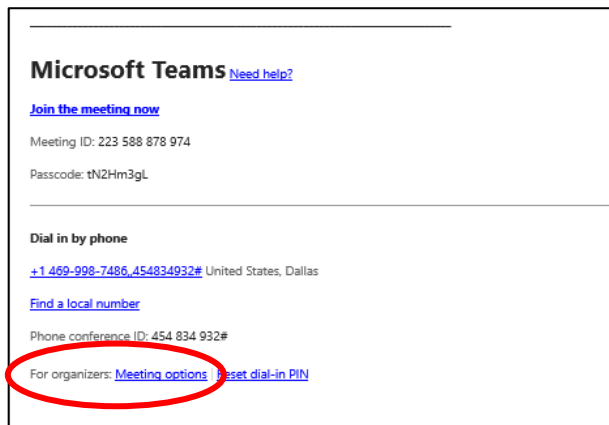
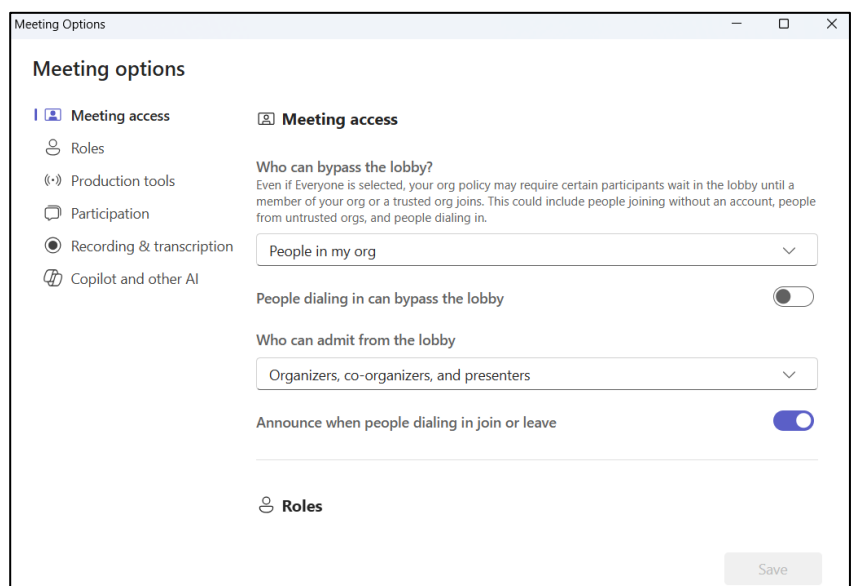


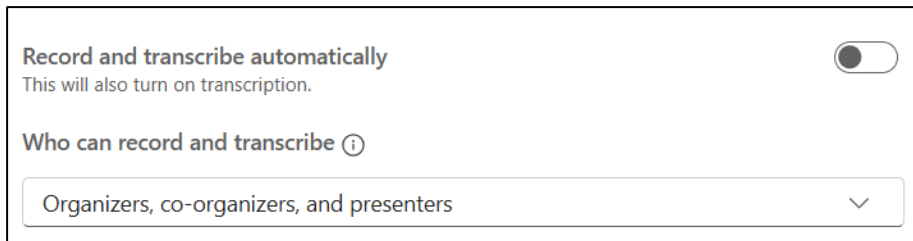
Figure 1 View from calendar event.



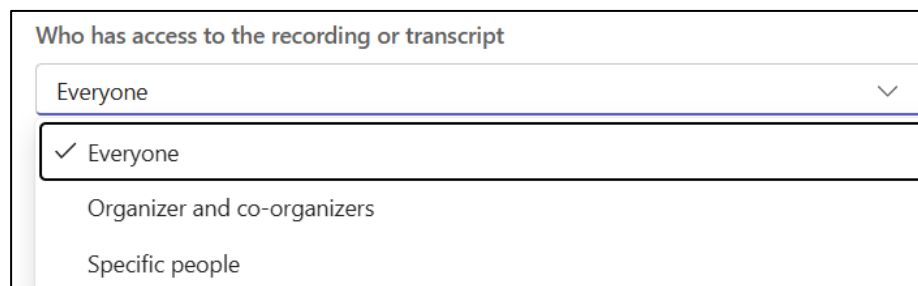
- **Copilot and other AI:** Copilot is configured at the administrative level to be allowed “during and after the meeting.” This setting requires that meeting recording/transcription is enabled to use Copilot.



- **Recording & transcription:** Meeting transcriptions must be enabled to use Copilot. Note: Recording/Transcription are disabled by default.



As a meeting owner, you can adjust who has access to the recording and transcription, but keep in mind that access to recording and transcription is required to use Copilot. NOTE: Recording/Transcript are set to be available to “Everyone” by default.



Copilot Limitations

- Teams Copilot for Meetings is limited to a single meeting that has a transcript, or an ongoing meeting where Copilot is running. Copilot will answer based on information available in the meeting transcript only.
- Very long meetings are currently not supported: answers may be limited in meetings over approximately 2 hours long.
- In chat scenarios, Copilot is limited to how much data it can process and how far back it will go to fetch an answer. The farthest Copilot can process is 30 days from the most recent message sent. It may also be further limited by message retention policies. In meeting scenarios, long meetings (longer than 2hr) may be affected by longer latency compared to shorter ones.
- Providing feedback when Copilot answers are incorrect or unhelpful will help the model improve. Use the thumbs-up or thumbs-down option in Copilot to provide specific feedback on inaccuracies.
- When using Copilot in a meeting within a series, it is necessary to confirm that Copilot is querying the right meeting content (recording/transcription). It is critical to review the cited content for accuracy to ensure the right content is being queried. If this error repeatedly occurs, you may have to reschedule the series.
- Microsoft 365 Copilot chat sessions are typically limited to around 20 responses per session. You may receive a warning if the chat session is approaching the max number of exchanges.