



AI Tools for Supervisors

Working Smarter, Safer, and with Confidence

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Responsible Artificial
Intelligence

Today's Journey — 45 Minutes

Bloom Taxonomy Progression: **Remember** → **Understand** → **Apply** → **Analyze** → **Evaluate**

01 **Remember**

Data Privacy Vulnerabilities

What goes wrong when AI is used without awareness

02 **Understand**

Advantages of AI for Your Work

Where AI saves time in supervisory tasks

03 **Understand**

UA AI Tools Ecosystem

Copilot, Gemini, Gemini Notebook (NotebookLM), GenAI Platform

04 **Apply**

Tool Recommendations

Matching the right tool to each task type

05 **Apply**

Prompt Engineering Frameworks

RACE and RISEN frameworks with live practice

06 **Analyze**

Data Privacy & Tool Selection

Public, Protected, Restricted — what goes where

07 **Apply/Create**

Building a Prompt Library

Templates your team will reuse every day

08 **Evaluate**

Best Practices & Closing

Key takeaways, action items, and resources

Each section includes a brief reflection or hands-on activity



Section 1

Data Privacy Vulnerabilities

What most users never knew they were exposing

Bloom: Remember

What Users See

- ✓ I typed a question, got an answer
- ✓ The chatbot is helpful and fast
- ✓ My conversation disappears when I close the tab
- ✓ It seems private — it's just me and the AI

What Actually Happens

- ⚠ Prompts may be stored & used to train models
- ⚠ Queries sent to external commercial servers
- ⚠ PII in prompts can be logged and reviewed
- ⚠ FERPA/HIPAA data may leave UA control
- ⚠ Unmanaged tools = no institutional accountability

Real-World Incidents: Cautionary Tales

Bloom: Remember



Samsung Electronics (2023)

What happened: Engineers pasted proprietary source code and meeting notes into ChatGPT to debug software.

Consequence: Trade secrets became training data. Samsung banned all use of external generative AI tools.



Healthcare Sector (2023)

What happened: Clinical staff used consumer AI to draft patient summaries, pasting patient names and diagnoses.

Consequence: Potential HIPAA breach. No BAA in place. Investigations launched.



Legal & HR Departments (2023–24)

What happened: Attorneys and HR staff entered confidential personnel data to draft documents.

Consequence: Attorney-client privilege compromised. PII of employees sent to unvetted external servers.

Supervisors Handle High-Risk Data Daily

Bloom: Remember

As a supervisor at UA, you routinely work with data across all three classification levels:

Employee Performance & Conduct

Evaluations, PIPs, disciplinary notes, salary info

Restricted

Student Records (FERPA-protected)

Grades, academic standing, enrollment, financial aid

Restricted

Personnel & Recruitment

Job applications, interview notes, references

Protected

Budget & Financial Planning

Departmental budgets, grants, expenditure details

Protected

Departmental Operations

Meeting agendas, project timelines, policies

Public



Section 2

Advantages of AI for Your Work

Why intelligent tools are worth mastering — responsibly

Bloom: Understand

What AI Can Do For You

Bloom: Understand



Drafting & Writing

Job descriptions, emails, memos, meeting agendas, policy summaries



Research & Synthesis

Summarize long documents, compare options, synthesize reports



Data Interpretation

Explain spreadsheet patterns, suggest visualizations, interpret results



Planning & Scheduling

Draft project timelines, prepare agenda structures, outline workflows



Communication Polish

Rewrite for clarity, adjust tone, translate jargon into plain language



Learning & Upskilling

Explain new concepts, generate training outlines, build quiz questions

Supervisory Tasks Transformed

Bloom: Understand

Before AI → With UA Managed AI

Supervisory Task	Before AI	With AI	Time Savings
Draft performance evaluation narrative	2–3 hrs	20 min	85%
Summarize 40-page policy document for team	3 hrs	15 min	92%
Write job posting from position description	1.5 hrs	10 min	89%
Prepare onboarding checklist for new hire	45 min	5 min	89%
Draft meeting agenda with action items	30 min	3 min	90%
Respond to complex email — professional tone	20 min	2 min	90%



Section 3

UA AI Tools Ecosystem

Institutional tools that protect your data while unlocking AI capabilities

Bloom: Remember → Understand

UA Managed AI Ecosystem

Bloom: Understand

Access via your UA NetID — institutional data protection included



NetID Login → Data
Protection



MS Copilot

Microsoft 365
integration
Word, Outlook,
Teams, Excel



Google Gemini

Advanced
reasoning &
long-document
analysis



NotebookLM (Gemini Notebook)

Research
synthesis &
private document
Q&A



UA GenAI Platform

Open-source
models:
Haiku · Sonnet ·
Opus · Gemma ·
Nova

Microsoft Copilot — Your Office AI Assistant

Bloom: Understand

Key Capabilities

-  **Word:** Draft, rewrite, summarize documents
-  **Outlook:** Compose emails, summarize threads
-  **Teams:** Meeting summaries & action items
-  **Excel:** Explain data patterns, suggest formulas
-  **SharePoint:** Query documents with natural language
-  **Copilot Chat:** Open Q&A with organizational context



Data Protection

- Data stays within Microsoft 365 tenant
- No training on your org's data (E3/E5 license)
- FERPA-compatible with proper data handling
- Audit logs available for IT governance



Access & Tips

- Login: microsoft365.com with NetID
- Mobile app available (Microsoft 365)
- Best for: document-heavy tasks in M365 suite
- Not recommended for: restricted HR data in free-text prompts

Google Gemini & NotebookLM (Gemini Notebook)

Bloom: Understand

Google Gemini

Advanced multimodal reasoning & long-context analysis

- **Long-context windows:** Analyze entire reports, grant proposals, policy documents
- **Multimodal input:** Process text, images, tables, and documents together
- **Google Workspace:** Integration with Docs, Sheets, Drive, Gmail
- **Deep Research mode:** Multi-step research with source citations
- **Code & data analysis:** Python, spreadsheet formulas, structured outputs

NotebookLM (Gemini Notebook)

Your private AI research assistant over your own documents

- **Upload your documents:** PDFs, Docs, slides, URLs — up to 50 sources per notebook
- **Private Q&A:** Ask questions; AI answers only from your uploaded sources
- **Auto-summaries:** Generates briefing docs, FAQs, study guides automatically
- **Audio Overview:** Converts your documents into a podcast-style discussion
- **Citation-grounded:** Every answer cites the source page — no hallucinations from outside

UA GenAI Platform — Open Source Models

Bloom: Understand

Hosted within UA infrastructure · Data never leaves the university network

Anthropic Claude Haiku

Fast

Fast & efficient
High-volume, simple tasks

Anthropic Claude Sonnet

Balanced

Balanced reasoning
Most supervisory tasks

Anthropic Claude Opus

Powerful

Deep reasoning
Complex analysis & writing

Google Gemma

Open

Lightweight open source
General tasks

OpenAI GPT (OSS version)

Open

Versatile reasoning
Code & text generation

Amazon Nova

Multi

Multimodal & enterprise
Long documents, images

<https://genai.arizona.edu/>



Section 4

Tool Recommendations for Regular Tasks

Matching the right tool to each task — a practical supervisor's guide

Bloom: Apply

Task-to-Tool Matching Matrix

Bloom: Apply

Task Type	MS Copilot	Gemini	NotebookLM	UA GenAI
 Draft emails / memos	★★★★	★★★	☆☆☆	★★★
 Summarize policy / procedure docs	★★★	★★★★	★★★★	★★★★
 Analyze long reports (50+ pages)	☆☆☆	★★★★	★★★★	★★★
 Draft performance narratives	★★★	☆☆☆	☆☆☆	★★★★
 Prepare job postings / HR docs	★★★★	★★★	☆☆☆	★★★★
 Research & synthesis tasks	☆☆☆	★★★★	★★★★	★★★
 Meeting agendas & action items	★★★★	★★★	☆☆☆	★★★★
 Budget or financial summaries	★★★	★★★	☆☆☆	★★★★

★★★★ Best fit ★★★ Good ★☆☆ Limited ☆☆☆ Not recommended | Red left bar = use UA GenAI for restricted data

Your Supervisor's AI Workflow at a Glance

Bloom: Apply

A simple decision framework to use before starting any AI-assisted task:

1

What is the task?

Drafting · Summarizing · Analyzing · Planning · Communicating

2

What data is involved?

Public → any tool | Protected → Copilot/Gemini (no PII in prompts) | Restricted → UA GenAI only

3

Which tool fits best?

M365-embedded task → Copilot | Long docs → NotebookLM/Gemini | Sensitive data → UA GenAI

4

Craft your prompt (RACE)

Role · Action · Context · Expectation — be specific, be clear, be complete

5

Review & verify the output

AI can hallucinate. Always verify facts, names, dates, policy references before using.

6

Save to your Prompt Library

If this worked well, save the prompt template for your team to reuse.



Section 5

Prompt Engineering Frameworks

How to communicate with AI to get professional-quality results

Bloom: Apply

Anatomy of an Effective Prompt

Bloom: Apply

✗ Vague Prompt

"Write a performance evaluation."

Problems with this prompt:

- No role defined — AI doesn't know your context
- No audience specified — who is this for?
- No tone — formal? encouraging? developmental?
- No structure — how long? what sections?
- No constraints — FERPA? UA policy references?

Result: Generic, unusable output that requires complete rewrite.

✓ Effective Prompt

"Act as a UA department supervisor writing a mid-year performance evaluation for a staff member in an administrative role. The employee has demonstrated strong organizational skills and met all project deadlines this quarter. Write a 200-word narrative suitable for an official UA performance review, using a professional and constructive tone. Focus on observable behaviors and departmental contributions. Do not include any names or identifying information."

Result: Professional, structured, policy-conscious output ready for light editing.

RACE Prompting Framework

Bloom: Apply

A four-element structure that reliably produces high-quality AI outputs:



Role

Tell the AI what persona or expertise to adopt.

"Act as a UA HR professional with expertise in employee relations..."



Action

State clearly what you want it to do — the verb matters.

"Draft / Summarize / Analyze / Compare / Create / Explain / Translate..."



Context

Provide the background, constraints, and audience.

"...for a new staff member unfamiliar with UA policy, in plain language..."



Expectation

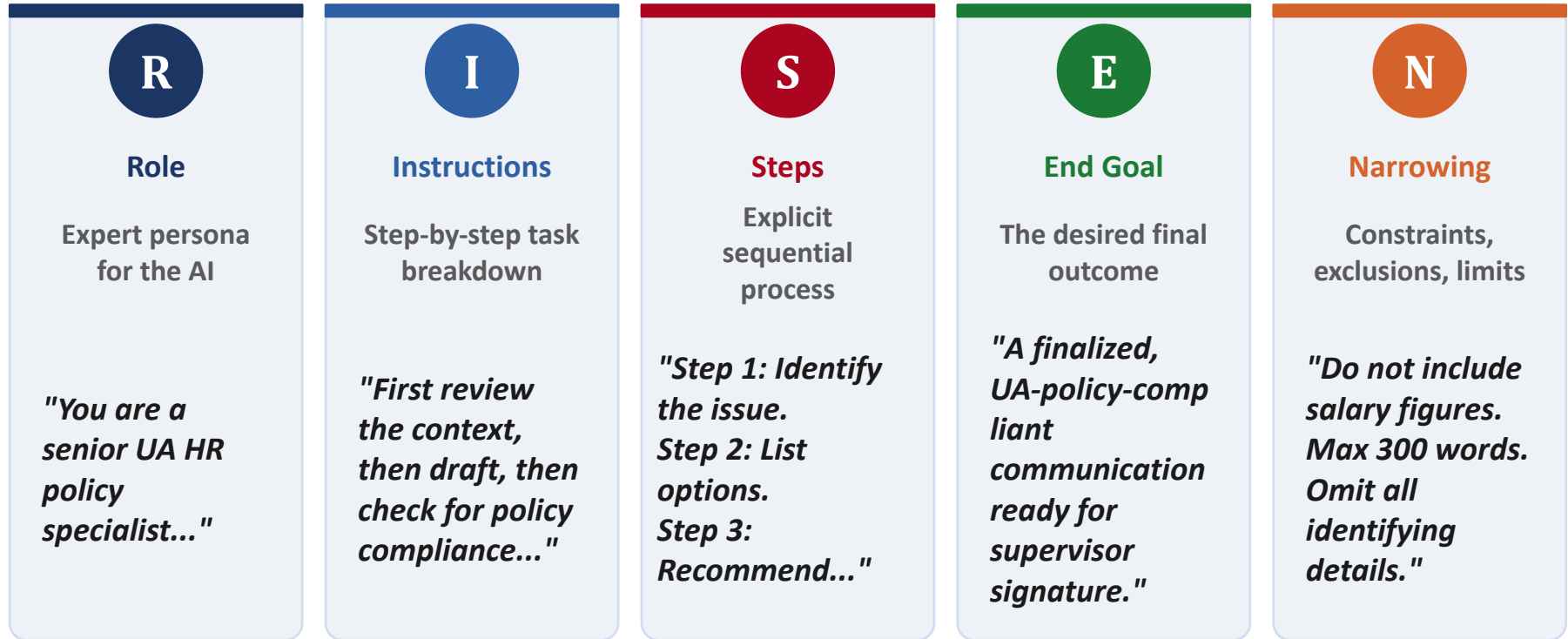
Define the format, length, tone, and any restrictions.

"...in 3 bullet points, under 150 words, professional tone, no jargon."

RISEN Framework — For Complex Tasks

Bloom: Apply

When RACE is not enough: use RISEN for multi-step, nuanced, or high-stakes outputs:



RISEN is ideal for: policy analysis · conflict resolution drafts · complex communications · multi-step planning

Prompt Iteration: From Draft to Excellence

Bloom: Apply

AI prompting is an iterative dialogue — not a single shot. Practice the refinement loop:

1

Initial Prompt

Write your best
RACE/RISEN
prompt. Be
specific.

*"Act as a UA
supervisor...
Draft a 200-word
email..."*

2

Evaluate Output

Read critically.
What is missing?
What is off? What
is great?

*"Too formal /
missing key point
/ wrong tone /
excellent
structure"*

3

Refine with Follow-up

Add a follow-up
instruction in the
same
conversation.

*""Make it shorter
and add a
call-to-action at
the end.""*

4

Iterate 1-2 More Times

Keep refining.
Most prompts
need 2-3
iterations.

*""Now add a
bullet list of next
steps for the
reader.""*

5

Save the Best Prompt

When you have a
great result, save
the refined
prompt template.

*"Add to your
team's Prompt
Library with
context notes."*



Section 6

Data Privacy & Tool Selection

Choosing the right tool based on the sensitivity of your data

Bloom: Analyze

UA Data Classification Framework

Bloom: Analyze

Before selecting an AI tool, classify your data. UA uses three levels:

PUBLIC

Information with no access restrictions; approved for public release.

Examples: Published policies, website content, press releases, course catalogs, public reports, job postings

AI guidance: Any UA managed AI tool is appropriate. Even publicly available tools may be used for public data.

PROTECTED

Non-public information for authorized users; moderate harm if disclosed.

Examples: Internal budgets, non-public research data, vendor contracts, employee contact lists, non-directory HR data

AI guidance: Use MS Copilot (M365) or UA GenAI Platform. Avoid pasting into free-form external tools.

RESTRICTED

Highly sensitive data; significant harm if disclosed. Governed by FERPA, HIPAA, ITAR, or contractual obligations.

Examples: Student educational records, medical/health data, SSNs, individual performance evaluations, disciplinary records, salary details

AI guidance: UA GenAI Platform ONLY. Draft with generalized placeholders; never include individual identifying details.

Decision Tree: Which Tool for Your Data?

Bloom: Analyze

What type of data is in your task?

PUBLIC DATA

Publicly approved info

- ✓ MS Copilot
- ✓ Google Gemini
- ✓ NotebookLM
- ✓ UA GenAI Platform
- ⚠ Consumer AI with care

PROTECTED DATA

Internal, non-public info

- ✓ MS Copilot (M365 context)
- ✓ UA GenAI Platform
- ✓ NotebookLM (UA account)
- ✗ Free consumer AI tools
- ⚠ No names/IDs in prompts

RESTRICTED DATA

FERPA, HIPAA, PII

- ✓ UA GenAI Platform ONLY
- ✗ MS Copilot (free-form prompts)
- ✗ Google Gemini
- ✗ NotebookLM
- ⚠ Use placeholders in prompts

FERPA, PII & HIPAA — What Supervisors Must Know

Bloom: Analyze

FERPA

Family Educational Rights and Privacy Act

What it covers: Protects educational records of students. Any record directly related to a student maintained by UA.

As a supervisor: Applies to you if you supervise staff who handle student records, or if you access enrollment, grades, or advising data.

AI Rule: Never paste student names + academic info into any AI prompt. Use placeholders: "Student A earned [grade] in [course]."

PII

Personally Identifiable Information

What it covers: Any data that identifies an individual: name, SSN, DOB, email, phone, address, employee ID, biometric data.

As a supervisor: Applies broadly: employee records, job applicants, vendor contacts, event registrations.

AI Rule: Strip PII before prompting. Replace with roles: "the applicant", "the employee", "the vendor contact."

HIPAA

Health Insurance Portability and Accountability Act

What it covers: Protects health information. Applies if your department handles employee medical accommodations or health plan data.

As a supervisor: ADA accommodations, FMLA documentation, workers' comp records may be HIPAA-adjacent.

AI Rule: Treat all health-related employee information as Restricted. UA GenAI Platform only, no health details in prompts.



Section 7

Building a Prompt Library

Creating reusable AI assets that multiply your team's efficiency

Bloom: Apply → Create

Why Your Team Needs a Prompt Library

Bloom: Apply → Create

Benefits for Your Team



Time Efficiency

Eliminate prompt re-invention. Proven templates produce results immediately.



Consistent Quality

Same prompt structure ensures consistent voice and output quality across team.



Knowledge Transfer

New team members use expert-level prompts from day one.



Privacy Compliance

Pre-vetted prompts have PII removed — safer by design.



Continuous Improvement

Team refines prompts over time — institutional AI learning.

Sample Prompt Entry

Task Name:	Mid-Year Performance Narrative
Data Class:	Restricted → UA GenAI Platform only
Framework:	RACE
Prompt Template:	<i>"Act as a UA supervisor writing a mid-year evaluation for a staff member in [ROLE]. The employee has demonstrated [STRENGTH 1] and [STRENGTH 2] this quarter. Write a 200-word professional narrative for an official UA review. Constructive tone. No names."</i>
Expected Output:	200-word narrative; review for accuracy before use
Last Refined:	Insert date when last tested / improved

Five Starter Prompts for Supervisors

Bloom: Create

Copy, adapt, and add to your team's Prompt Library:

Draft a job announcement

Data: Protected

"Act as a UA HR professional. Draft a job posting for a [POSITION TITLE] in [DEPARTMENT]. Key responsibilities: [LIST]. Required qualifications: [LIST]. UA benefits paragraph included. Professional tone, 300 words."

Summarize a long policy document

Data: Public

"You are a UA policy analyst. I will paste a section of a UA policy document. Summarize it in plain language for non-specialist staff in 5 bullet points. Highlight any compliance requirements or deadlines."

Draft an agenda for a team meeting

Data: Public

"Act as an experienced meeting facilitator. Create a structured 60-minute team meeting agenda focused on [TOPIC]. Include: welcome, updates, discussion items (with time allocations), decisions needed, and action items section."

Compose a sensitive email response

Data: Protected

"You are a professional communicator helping a UA supervisor. Draft a response to a concern raised by a team member about [GENERAL TOPIC — NO NAMES]. Tone: empathetic, clear, and solution-oriented. Under 150 words."

Performance narrative draft

Data: Restricted → UA GenAI only

"Act as a UA supervisor. Draft a 200-word mid-year performance narrative for an employee in [ROLE] who has demonstrated [GENERAL STRENGTH]. Professional tone. Constructive and specific to observable behaviors. No identifying details."

Best Practices & Key Takeaways

1

Classify before you prompt

Always ask: Public, Protected, or Restricted? Then select your tool.

2

Strip PII from every prompt

Replace names, IDs, and identifying details with role placeholders.

3

Use RACE or RISEN frameworks

Structured prompts produce dramatically better, more consistent outputs.

4

Verify every AI output

AI can hallucinate. Review dates, names, facts, policy references before using.

5

Build and share prompt libraries

Institutionalize effective prompts so your whole team benefits.

6

Stay current & report concerns

AI tools and policies evolve. Consult UITS and UA IT Security with questions.

Resources & Next Steps

 Access UA AI tools: microsoft365.com · gemini.google.com · notebooklm.google.com (all via NetID)

 UA Data Classification Policy: uits.arizona.edu/categories/data-security

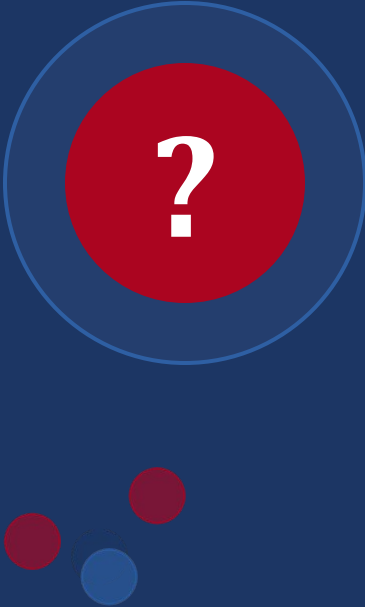
 UA GenAI Platform: Contact UITS Research Computing for access and onboarding

 UA FERPA & Data Privacy Resources: registrar.arizona.edu/privacy

 Action item: Create your team's Prompt Library document this week — start with 3 prompts.

Questions & Discussion

Section 8



Let's discuss how AI fits into your workflow

- What common supervisor tasks would you like to build templates for?
- How can we collaborate on maintaining a shared team Prompt Library?
- What questions do you have about the UA Data Classification Policy?
- How can we best onboard new team members to these standard prompts?