

Transparency Copilot Starter Kit (v1.1)

HOLE Foundation - theholetruth.org

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1) Why AI + Oversight (Big Brother, in Reverse)

Artificial intelligence is finally useful for everyday civic work. We now have assistants that can **draft**, **organize**, and **reason** across large piles of documents and emails. If we design the system ethically, we can point these tools **at the government**, not at citizens- **Big Brother in Reverse**-to keep the public sector honest.

> Our promise: we teach you a workflow that anyone can run at home. No gatekeepers. No secrets.

2) Choose your AI Stack

Best combo: use **both ChatGPT (OpenAI)** and **Claude (Anthropic)**. Each excels at different jobs.

- **ChatGPT**: excellent with *very long* documents and complex summarization; supports **Connectors** (including Gmail, Calendar, Contacts) and has cross-chat **Memory** controls.
- **Claude**: superb writer and planner; durable project/workspace memory and first-class **MCP** support in **Claude Desktop** to connect desktop tools.

Budgeting: If you're serious about records work, plan on a **Pro/Plus**-level subscription **for 1-3 months** while you spin up your campaign. You *can* run with only one service to save money; if so, pick the one that matches your heaviest task (ChatGPT for giant PDFs; Claude for drafting + MCP tools).

3) Your Foundation: One Dedicated Gmail

Before touching AI, pick **one email address** for *all* correspondence with records custodians (ideally a Workspace account on your domain).

Setup checklist

- Create/choose a Gmail (or Google Workspace) address solely for records work.
- Turn on **2-Step Verification** and **app passwords** where applicable.
- Create Gmail **labels**: ``TPIA/FOIA - Drafts``, ``Filed``, ``Agency - [Name]``, ``AG - Rulings``, ``Invoices``, ``Deadlines``, ``Appeals``, ``Production - Received``.
- Create **filters** to auto-label agency domains and AG notices.
- Save a **signature** with your contact info + a link to theholetruth.org/support.
- Optional but recommended: a separate **Google Drive** folder for productions.

Connect your inbox to AI (built-in; no code)

- In **ChatGPT**: go to **Settings -> Connectors -> Gmail** and connect. ChatGPT can automatically use Gmail/Calendar/Contacts in chat once enabled.

- In **Claude**: enable the built-in **Gmail** integration (and Calendar if useful) in **Settings/Integrations**. Claude will cite which messages it used.

> Advanced (optional): you can still add a **custom Gmail MCP server** if you want fine-grained behaviors (e.g., programmatically opening/downloading attachments within an MCP workflow). This is entirely optional; the built-in Gmail integrations already cover searching/reading messages.

4) Claude + MCP Quickstart (Desktop Commander)

What is MCP? An open standard that lets assistants connect to tools and data—think of it as **USB-C for AI**. Claude Desktop speaks MCP natively.

A. Install Claude Desktop & Desktop Commander

1. Install **Claude Desktop** (macOS/Windows).
2. Install **Desktop Commander MCP** (gives Claude file-system + terminal access).
3. In Claude Desktop, open **Settings -> Tools -> MCP** and add Desktop Commander (per tool's README).
4. Test with prompts like:
 - "Open my `Records/` folder and list files."
 - "Create `PIA/2025-08-22/City/` and initialize a `readme.md` with today's tasks."

B. Gmail access (recommended path)

- Prefer the **built-in Gmail integration** in Claude (no server required). Ask: "Search my inbox for agency responses this week and summarize deadlines."

C. Optional: Custom Gmail MCP

- Only if you want **automations on attachments** or custom flows. Otherwise, skip it.

Example `mcpSettings.json` (Desktop Commander only)

```
{ "mcpServers": { "desktop-commander": { "command": "desktop-commander", "args": [ ] } } }
```

5) Division of Labor (ChatGPT ↔ Claude)

- **ChatGPT**: ingest big PDFs (statutes, handbooks), build **deadlines tables**, extract **citation-level** summaries, generate **production checklists**, draft **appeals** from long records.
- **Claude**: draft **letters**, **complaints**, **cover emails**, and **training guides**; manage your local files via Desktop Commander; run repeatable MCP-assisted workflows (e.g., file naming, CSV merges).

> Rule of thumb: **ChatGPT for volume**; **Claude for voice**. Use both when possible.

6) The Four-Step Oversight Loop (Our Method)

1. **IDENTIFY** - What records move the public interest? Who holds them? What statute governs?
2. **REQUEST** - Draft precise asks: scope, date bounds, formats, fee limits, metadata.
3. **AUDIT** - Track deadlines, detours (clarifications, AG referrals), and missing items.

4. **PLAN** - If cooperation stalls, escalate: cure letters, AG challenges, mandamus.

Starter Prompts

- "From this handbook PDF, list statutory **deadlines**, **clock-stop rules**, and **mandatory disclosures**."
- "Generate a narrowly scoped request for **body-worn camera metadata** from {Agency} between {dates}. Include a **cost cap** and **request for fee waiver**."
- "Given these emails, build a timeline and flag **missed statutory steps**."

7) Budgeting & Time

- Expect **20-60 hours** to spin up your first campaign (setup, requests, tracking).
- Plan for **1-3 months** of **Pro/Plus** AI subscriptions while building momentum, then reassess.
- Keep a **log** of hours, fees, and wins-this helps with fundraising and impact reports.

8) Security, Ethics, and Good Hygiene

- Use **two-factor auth** everywhere; keep secrets in **.env** files (not in prompts).
- Keep a **source-of-truth** folder structure. Prefer **open formats** (CSV, PDF/A, TXT).
- Redact responsibly. Don't publish sensitive PII of private citizens.
- AI is a tool, not a lawyer. When in doubt, **verify with original statutes/case law**.

Appendix A - Gmail Labels & Filters (Template)

- `TPIA/FOIA - Drafts` -> matches `subject:(draft)` OR messages you star manually.
- `AG - Rulings` -> matches from: `@texasattorneygeneral.gov` or similar.
- `Production - Received` -> matches has:attachment AND `from:(@elpasotexas.gov OR ...)`
- `Deadlines` -> create calendar events from emails containing "within X business days."

Appendix B - Prompt Library (Copy/Paste)

- "Convert this ruling PDF into a **checklist** of obligations the agency must meet."
- "Summarize this 200-page production and **prioritize** follow-ups by public value."
- "Draft a **fee waiver** citing public interest factors and my non-commercial use."
- "Write a **cure letter** identifying procedural defects and proposing a fix-by date."

Appendix C - Troubleshooting

- **Desktop Commander won't start** -> check PATH, Node/py version.
- **ChatGPT can't see Gmail** -> confirm **Connectors** -> Gmail is enabled.
- **Claude loses context** -> split tasks: store long PDFs in ChatGPT; keep drafting/planning in Claude with MCP files.

Want help?

- Visit **theholetruth.org/support** to fund this work or volunteer.
- Email **info@theholetruth.org** for training and collaboration.