

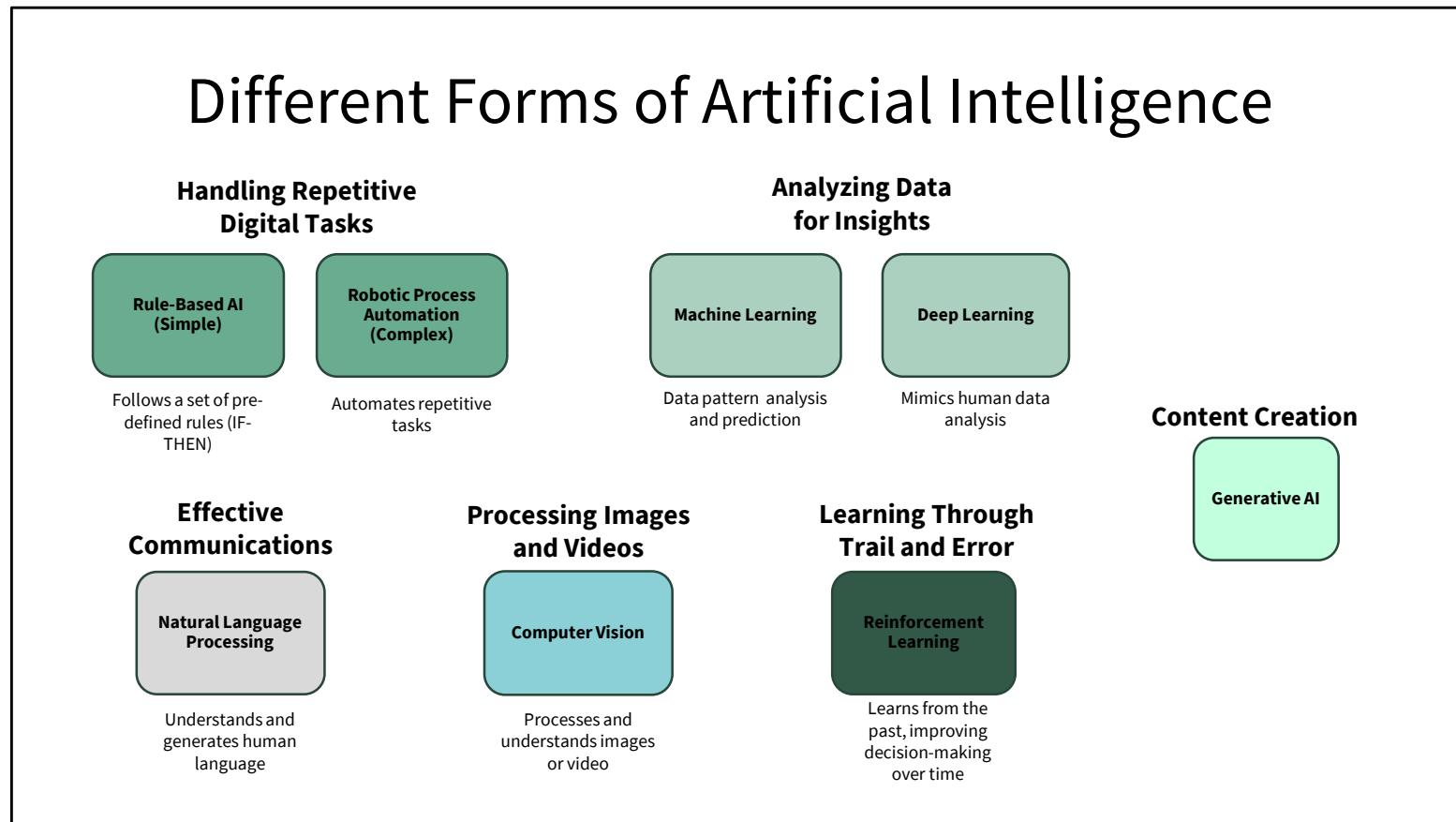
Unlocking Generative AI

BCNPHA - Housing Central Conference - November 20,
2024

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Different Forms of Artificial Intelligence



Rule-Based AI: This is the most basic form of AI, where the system follows a set of pre-defined rules. Think of it like a digital “if-then” tool. For example, a rule-based AI could help a non-profit by automating simple tasks like sending automated thank-you emails after a donation. However, it can’t learn or adapt; it only follows its programmed rules.

Robotic Process Automation (RPA): RPA uses AI to automate repetitive tasks. For non-profits, this could mean automating data entry, updating records, or processing forms, freeing up time for staff to focus on mission-critical activities.

Machine Learning (ML): This type of AI goes a step further by learning from data. Instead of just following rules, ML systems can analyze patterns and make predictions based on past data. For a non-profit, ML

could help analyze donor data to identify which supporters are most likely to donate again or determine patterns in program usage to improve services.

Deep Learning: This is an advanced form of ML that uses “neural networks” to mimic the way the human brain processes information. Deep learning can be very effective in analyzing complex data, like identifying trends in large datasets. For non-profits with substantial amounts of data, deep learning could help uncover insights about donor behavior, volunteer patterns, or community needs.

Natural Language Processing (NLP): NLP is a type of AI that understands and generates human language. This can be particularly helpful for a non-profit’s communications. For example, NLP can power chatbots that answer frequently asked questions on your website or generate personalized messages for supporters based on their donation history and interests.

Computer Vision: This AI type processes and “understands” images or videos. For a non-profit, computer vision could be useful in scenarios like analyzing visual data to track and evaluate field projects, such as recognizing areas in need of disaster relief or counting supplies from photos.

Reinforcement Learning (RL): RL is a type of AI that learns through trial and error, improving its decisions over time to achieve a specific goal. Though less common in non-profits, RL could be useful in complex decision-making situations, like optimizing resource allocation for programs or testing different fundraising strategies to see which works best.

Generative AI: This type of AI creates new content, like text, images, or even video, based on the patterns it has learned from existing data. For non-profits, generative AI can help write content, design visual materials, or create ideas for social media. It’s like having a virtual assistant that can quickly draft messages or suggest designs based on your needs.

What Is Generative AI

Generative AI is a type of artificial intelligence designed to create content like text, images, and videos

Gen AI can be a game-changer in a few key ways:

Content Creation

Data Analysis

Efficiency Boost

Personalization

Gen AI is like a digital helper, giving you creative and analytical support that allows your team to do more with limited resources

Generative AI, or "Gen AI," is a type of artificial intelligence designed to create content like text, images, and even videos.

Imagine it as a creative assistant that can help your team brainstorm ideas, write reports, or develop content for your website and social media, often with just a simple prompt.

Content Creation: If your team needs help creating newsletters, social media posts, or blog articles, Gen AI can quickly draft ideas or full pieces, saving time and resources that can be focused on core activities.

Data Analysis: Non-profits often work with limited data or face challenges in analyzing it. Gen AI can help summarize reports or create insights, allowing your team to understand trends and make data-driven decisions without extensive data expertise.

Efficiency Boost: Gen AI can automate tasks that typically require more time, like sorting through information, drafting responses, or creating templates. This can allow a small team to accomplish more, enhancing outreach, grant writing, and reporting efforts.

Supporting Personalization: For donor communications, Gen AI can generate personalized messages based on donor history, making outreach more impactful and helping you connect better with supporters.

What Is Generative AI Not

Generative AI is powerful, but it's important to understand what it is not

Not a Replacement for Human Connection

Not a Fully Autonomous Tool

Not a Data Specialist

Not a Substitute for Expertise

In short, Gen AI is a tool to support your team, but it's not a standalone solution for driving your mission. It's best used as an assistant, not a replacement, helping your organization work more efficiently while leaving the essential human connections and critical thinking to your team.

Not a Replacement for Human Connection: Gen AI can create content, but it doesn't understand human emotions, community needs, or the mission-driven heart of a non-profit. It lacks the empathy and personal touch that only your team can provide, especially in building relationships with donors, clients, and community members.

Not a Fully Autonomous Tool: Gen AI can help with drafting content or analyzing data, but it's not a "set it and forget it" solution. It needs direction, review, and oversight. Left unchecked, it can produce errors or generate information that doesn't align with your organization's voice or values.

Not a Data Specialist: Although Gen AI can summarize information and find patterns, it doesn't have the capability to deeply understand your organization's data, its unique challenges, or interpret the information in a way that a human data analyst or program expert could.

Not a Substitute for Expertise: Gen AI lacks the context and knowledge your team members have in fields like social work, advocacy, or donor relations. It can't replace the insight and experience that come from working closely with your community.

Transformative Potential

The transformative potential of Generative AI is vast, primarily because it can support the mission-driven work of a small team in powerful ways.

Expanding Reach with Fewer Resources

Personalizing Communications

Automating Repetitive Tasks

Improving Data Access and Understanding

Supporting Innovation in Program Delivery

Scaling Up Impact

Expanding Reach with Fewer Resources: Gen AI can generate content quickly and at a high volume, whether it's for social media, newsletters, reports, or donor communications. This can help a non-profit reach more people without requiring additional staff, allowing small teams to engage supporters, raise awareness, and build connections in ways that would otherwise be time-consuming or costly.

Personalizing Communications: Gen AI can tailor messages based on supporter data, creating personalized emails, donation thank-yous, or even campaign messages. This personal touch helps donors feel valued and connected, which can strengthen relationships, increase retention, and drive more support.

Automating Repetitive Tasks: Many non-profits have limited staff and rely on volunteers. Gen AI can handle routine tasks like drafting initial responses to inquiries, generating first drafts for proposals or reports, and summarizing data, freeing up time for staff to focus on activities that require their unique expertise and human

touch.

Improving Data Access and Understanding: Non-profits often have data (from surveys, reports, or donor records) but limited capacity to analyze it deeply. Gen AI can help by summarizing complex information, identifying patterns, or generating reports that are easy to understand, making data-driven decision-making more accessible without needing a full-time data analyst.

Supporting Innovation in Program Delivery: Gen AI can help generate ideas and solutions for program development by suggesting best practices, summarizing research, or even brainstorming new approaches based on available information. This can give non-profits new ways to tackle challenges, adapt to community needs, and deliver their services more effectively.

Scaling Up Impact: With the efficiencies Gen AI offers, non-profits can achieve a greater impact without requiring a larger workforce. For example, automating parts of outreach or fundraising can enable the team to connect with more supporters and advocate more widely for the cause, amplifying impact with limited resources.

In essence, Gen AI can transform a non-profit's ability to maximize its impact by taking on labor-intensive tasks, boosting engagement, and enhancing the organization's capacity to analyze data and generate ideas. It's like adding a resourceful digital assistant to the team, allowing the non-profit to scale up its mission without scaling up its expenses.

Key Challenges and Risks

While Generative AI offers valuable support, it also comes with certain risks and challenges that need careful consideration.

Data Privacy and Confidentiality

Ethical and Transparency Concerns

Bias in AI Outputs

Security Vulnerabilities

Cost and Resource Implications

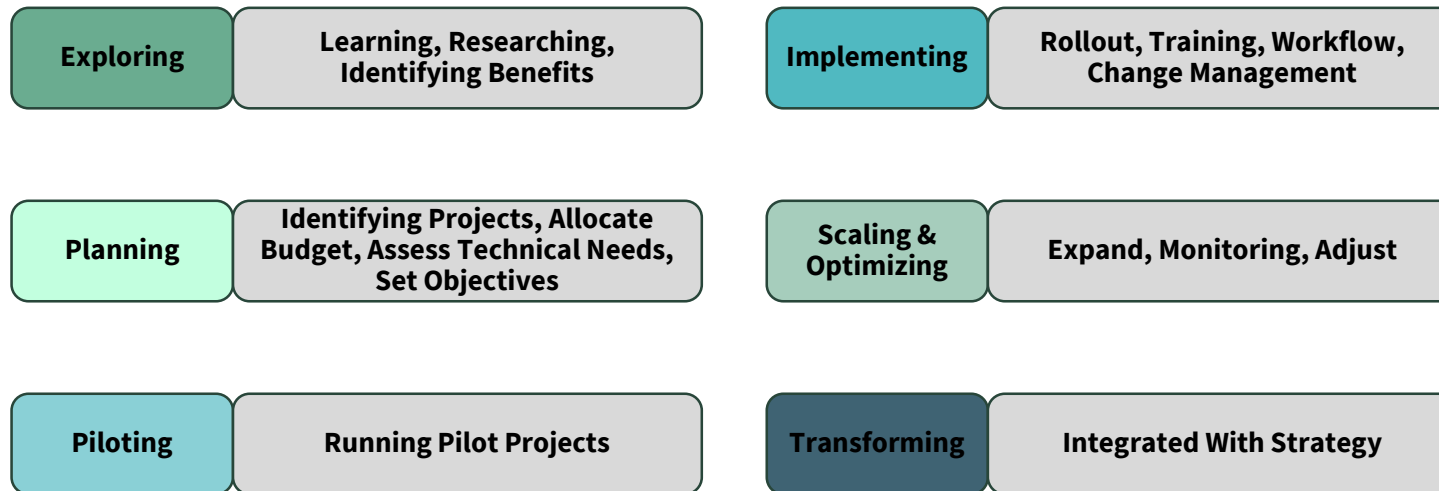
Over-Reliance on AI

Inaccurate or Unreliable Output

Training and Change Management

While Generative AI offers promising advantages, but steps must be taken to protect data, ensure ethical and accurate use, maintain human connections, and stay transparent to fully leverage the technology while keeping values and relationships intact.

Stages of Generative AI Implementation



What stage is your organization at?

Organizations typically go through several stages as they explore and adopt Generative AI (Gen AI). Here's a breakdown of these stages in simple terms:

1. Exploring

•**What It Is:** The organization is learning about Gen AI, researching potential benefits, and identifying how it might help them. They may attend workshops, read case studies, or discuss AI ideas with staff.

•**Goal:** Understand the basics of AI and start thinking about possible use cases.

2. Planning

•**What It Is:** The organization decides on specific Gen AI projects that align with its goals, like automating tenant inquiries or creating data summaries. At this stage, they start to allocate budget, assess technical needs, and set objectives.

- Goal:** Choose AI projects that offer clear benefits and create a plan for implementing them.

3. Pilot Testing

- What It Is:** The organization runs a small test or "pilot" project with Gen AI to see how it works in practice. This could involve limited use of a chatbot to answer common tenant questions or using AI to draft internal reports.

- Goal:** Test AI on a small scale, gather feedback, and learn what adjustments are needed.

4. Implementing

- What It Is:** After a successful pilot, the organization starts rolling out Gen AI tools more broadly. Staff may receive training on how to use the tools, and new workflows may be established to integrate AI into daily tasks.

- Goal:** Make Gen AI part of regular operations, with clear processes and support for staff.

5. Scaling and Optimizing

- What It Is:** The organization expands its AI use, applying it to more areas or serving more users. They monitor performance closely, gather feedback from staff and users, and make ongoing adjustments to improve AI effectiveness.

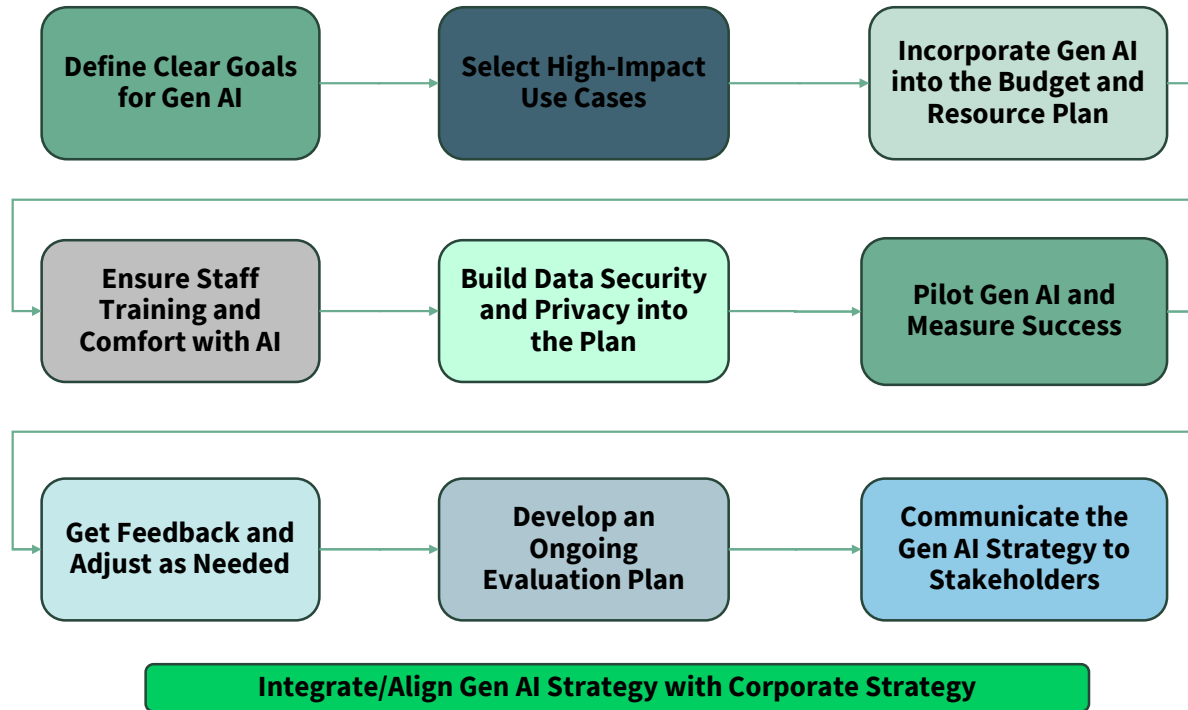
- Goal:** Use AI in a way that scales with the organization's growth, making continuous improvements.

6. Transforming

- What It Is:** At this advanced stage, Gen AI is fully integrated into the organization's strategy and operations. AI insights and automation play a key role in decision-making, and the organization regularly adapts and evolves its AI use to stay aligned with its mission.

- Goal:** Leverage AI as a core tool that enhances the organization's impact, service delivery, and overall mission. These stages provide a roadmap for moving from initial curiosity to full integration, with each stage allowing the organization to learn, test, and adjust as they progress.

Methodology and Strategic Alignment



Integrating Generative AI (Gen AI) into a non-profit's strategic business plan can be a game-changer, especially for achieving efficiency and scaling impact. Here's how a non-profit might approach it, step-by-step, in simple terms:

1. Define Clear Goals for Gen AI

- Start by identifying specific areas where Gen AI could help the organization reach its goals. For example, is the priority to improve donor communication, streamline operations, or analyze data for better program impact?
- Define clear objectives, such as “use Gen AI to increase donor retention by 10%” or “reduce staff time on routine tasks by 20%.”

2. Select High-Impact Use Cases

- Based on the goals, choose a few key areas where Gen AI can make a meaningful impact. For a non-profit, these might include:

- Automating thank-you emails and receipts for donors
- Drafting content for newsletters and social media
- Creating FAQs or chatbots for common inquiries

•Start small by focusing on high-impact, low-risk tasks to test the waters.

3. Incorporate Gen AI into the Budget and Resource Plan

- Determine what tools or software are needed and estimate the costs. Include expenses for software subscriptions, staff training, or any technical support.
- Ensure that these expenses fit into the overall budget and consider grants or funding for technology innovation if available.

4. Ensure Staff Training and Comfort with AI

- Set up training sessions for staff to understand how Gen AI will be used and how it can assist in their daily tasks.
- Create guidelines for when to use Gen AI and when to rely on personal communication, especially for sensitive interactions with donors or beneficiaries.

5. Build Data Security and Privacy into the Plan

- Since Gen AI may involve sensitive data, ensure it aligns with the organization's data privacy policies and relevant regulations.
- Create protocols for data management, such as what information the AI can access and how it will be secured.

6. Pilot Gen AI and Measure Success

- Launch a small pilot program for the selected use cases. For instance, start by using Gen AI only in donor communications or for generating impact reports.
- Track key performance indicators (KPIs) tied to your goals, like time saved, increase in engagement, or donor retention rates. This helps measure Gen AI's impact on organizational goals.

7. Get Feedback and Adjust as Needed

- Gather feedback from staff and, if possible, from donors or clients who interact with Gen AI-driven services.
- Adjust the plan based on this feedback, refining the AI's role in the organization and expanding its use to other areas as comfort and results grow.

8. Develop an Ongoing Evaluation Plan

- AI is constantly evolving, so make regular evaluation a part of the strategy. Review Gen AI's performance against goals each quarter or year and update the approach as needed.
- Stay aware of any new AI tools or best practices that could enhance the organization's use of Gen AI.

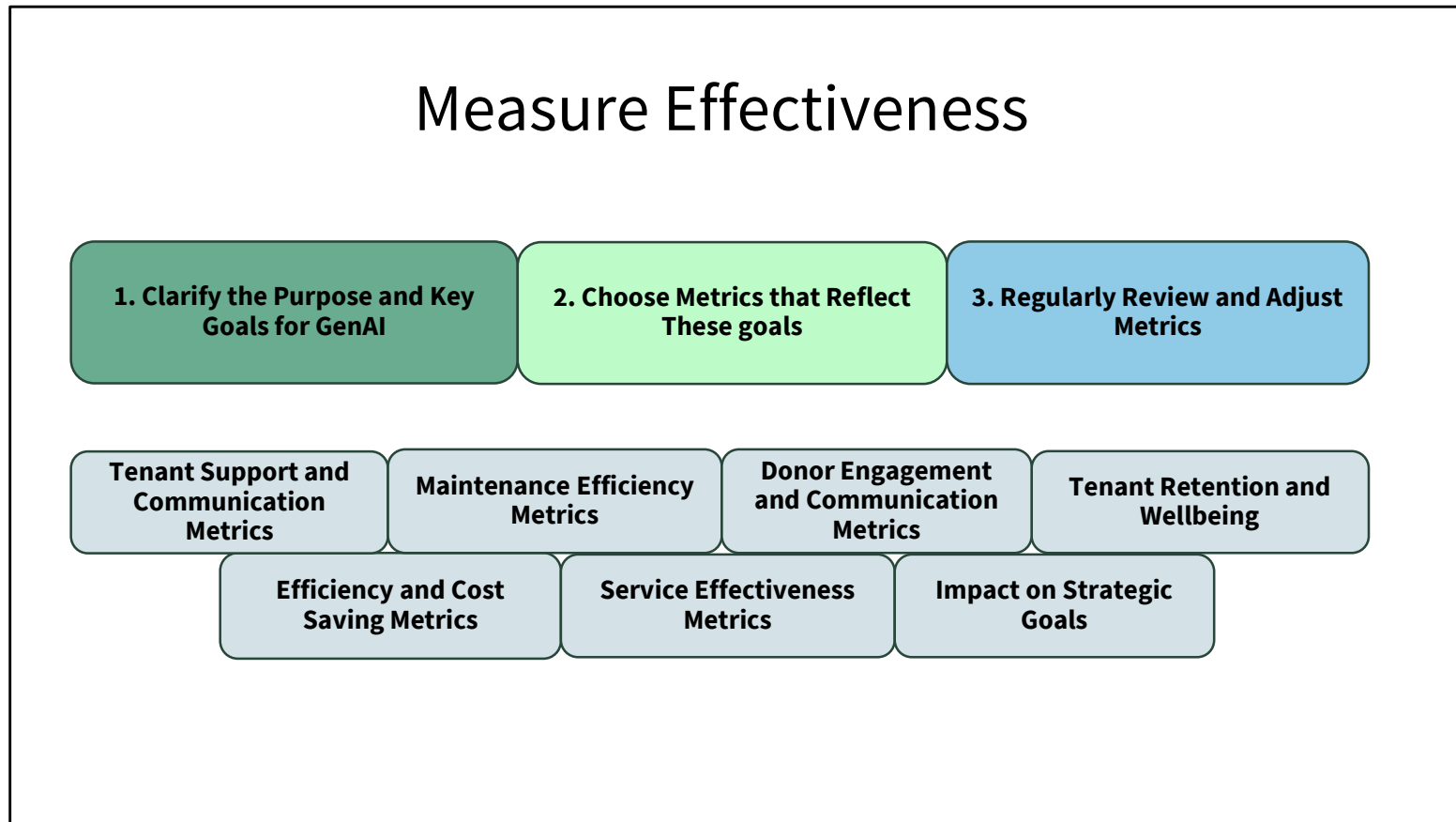
9. Communicate the Gen AI Strategy to Stakeholders

- Be transparent about how Gen AI is enhancing the organization's mission and helping achieve strategic goals. Share success stories, such as improved donor engagement or more efficient service delivery.

- This keeps stakeholders informed and helps build support for Gen AI as part of the organization's long-term strategy.

In summary, integrating Gen AI into the strategic plan

Measure Effectiveness



1. Clarify the Purpose and Key Goals for Gen AI

- Define the main reasons for using Gen AI. Goals might include improving tenant satisfaction, reducing response times for maintenance requests, or enhancing donor engagement.
- Based on these goals, ask questions like:
 - Is Gen AI helping us communicate better with tenants?
 - Are we seeing improvements in maintenance request handling?
 - Is donor engagement increasing with AI-assisted communications?

2. Choose Metrics that Reflect These Goals

A. Tenant Support and Communication Metrics

- **Response Time for Tenant Inquiries:** Measure how quickly Gen AI-powered chatbots or email systems respond

to tenant questions or concerns.

- **Example:** Compare average response times for tenant inquiries before and after using Gen AI to see if it helps tenants get answers faster.

•**Tenant Satisfaction with Communication:** Conduct periodic surveys to gauge tenant satisfaction with AI-assisted communication, like automated messages or chatbot support.

- **Example:** Survey tenants on how clear, helpful, and timely Gen AI responses are, and track changes over time.

B. Maintenance Efficiency Metrics

•**Maintenance Request Categorization and Prioritization Accuracy:** Track how effectively Gen AI helps sort and prioritize maintenance requests.

- **Example:** Measure the accuracy of Gen AI's prioritization of urgent vs. routine issues and whether it leads to faster response times for critical issues.

•**Time Saved in Request Handling:** Monitor time saved by using Gen AI to categorize requests and provide initial troubleshooting tips to tenants.

- **Example:** Track the reduction in manual sorting and response time for maintenance issues with Gen AI, allowing staff to focus on urgent matters.

C. Donor Engagement and Communication Metrics

•**Donor Response Rate:** Measure engagement with AI-generated donor emails or messages, including open and response rates.

- **Example:** Compare open rates and donations from AI-generated donor communications versus traditional communications.

•**Donation Growth and Frequency:** Track changes in donation amounts and frequency since implementing Gen AI for donor outreach.

- **Example:** Look at donation patterns over time to see if Gen AI helps maintain or increase donor contributions.

D. Tenant Retention and Wellbeing Metrics

•**Tenant Satisfaction with Services:** Conduct surveys to assess tenant satisfaction, especially with areas influenced by Gen AI, like communication speed and service accessibility.

- **Example:** Include questions on the ease of finding information, response times, and clarity of communication to track satisfaction.

•**Tenant Retention Rate:** Look for any changes in tenant retention, as improved communication and faster service responses might lead to higher satisfaction and retention.

- **Example:** Track any increase in lease renewals that could indicate improved satisfaction.

E. Efficiency and Cost Savings Metrics

•**Staff Time Saved on Routine Tasks:** Track how much time Gen AI saves for staff in drafting messages, handling inquiries, or managing routine tasks.

- **Example:** Measure average time spent on these tasks before and after Gen AI implementation to see if it allows staff to focus on higher-impact work.

•**Cost Savings from Automation:** Calculate how much the organization saves by using Gen AI for tasks like content creation, data analysis, and donor outreach.

- **Example:** Compare costs for services now automated by Gen AI versus previous expenses for external support or additional staff time.

F. Maintenance and Service Effectiveness Metrics

•**Frequency of Repeat Maintenance Requests:** Track whether Gen AI's support in maintenance management reduces repeat requests, indicating effective solutions for tenants.

- **Example:** Monitor repeat request rates to see if Gen AI's categorization helps staff address root issues, reducing the number of repeat requests.

•**On-time Completion Rate for Maintenance:** Check whether Gen AI's prioritization of maintenance requests helps complete repairs on time.

- **Example:** Track on-time completion rates and monitor if Gen AI's categorization improves scheduling efficiency.

G. Impact on Strategic Goals

•**Improvement in Tenant Wellbeing Programs:** Use Gen AI to generate ideas for wellbeing initiatives, then measure participation rates and satisfaction.

- **Example:** Track tenant participation in programs or workshops Gen AI helps organize and survey participants for satisfaction feedback.

•**Engagement with Informational Resources:** If Gen AI is used to draft or summarize informational content (e.g., rights, resources, and FAQs), track how many tenants engage with and find it helpful.

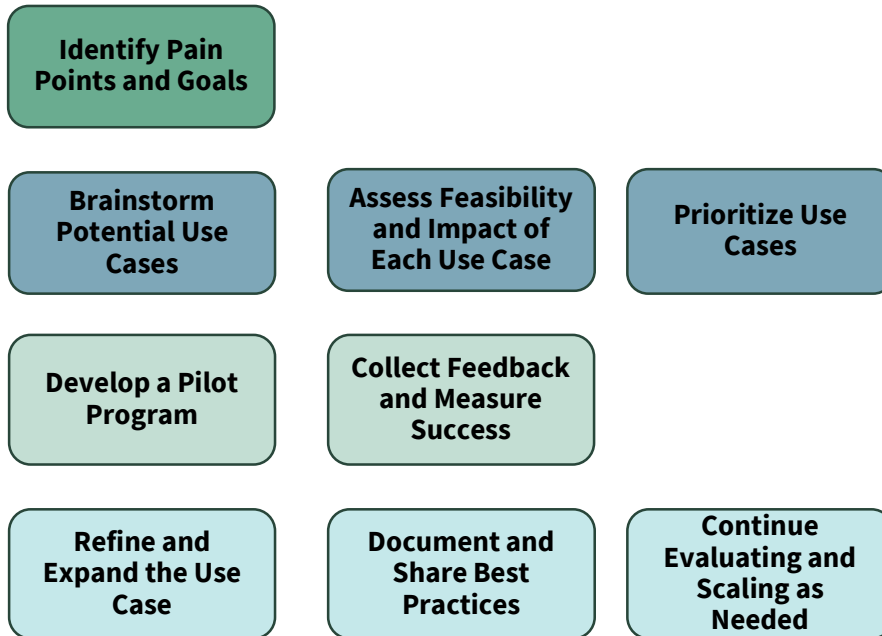
- **Example:** Monitor the number of views or downloads of AI-generated informational resources to assess usefulness and impact.

3. Regularly Review and Adjust Metrics

•Set up regular intervals to evaluate these metrics, such as quarterly or biannually, to see if Gen AI is meeting the organization's goals.

•Use the data to make adjustments, like refining how Gen AI sorts maintenance requests or enhances donor communications, and consider expanding its use if results are positive.

Use Cases



Always Keep At Top of Mind

- Focus on creating a thoughtful balance between innovation and responsibility
- Start with clear goals that align with your organizational mission, engage diverse stakeholders to ensure relevance, and prioritize ethical practices to build trust.
- View pilots as opportunities to learn and refine, not just as proofs of concept.
- Always measure impact and success while keeping scalability and adaptability in mind.
- Ensure the technology augments your organization's purpose, empowering both your teams and the people you serve

. Identify Pain Points and Goals

- Start by gathering input from staff, tenants, and other stakeholders to understand where there are challenges or needs. Focus on areas like tenant support, maintenance efficiency, donor engagement, and community outreach.
- Ask questions like:
 - What tasks take up too much time or resources?
 - Where do tenants and staff experience the most delays or frustrations?
 - What processes could be made more efficient to support our mission?
- **Example:** If tenants often experience delays in getting answers to questions, this could be an area where AI could help with faster responses.

2. Brainstorm Potential Use Cases

- Based on these pain points, brainstorm ideas for how Gen AI could help. Focus on tasks that are repetitive, time-consuming, or require handling large amounts of information.
- Involve teams from different areas (like tenant services, maintenance, and donor relations) to make sure use cases reflect real needs.
- Example:** If there's a need for faster communication with tenants, a potential use case could be an AI chatbot that answers common questions (e.g., rent payment, maintenance requests).

3. Evaluate Feasibility and Impact of Each Use Case

- For each idea, consider the feasibility (how easy or challenging it will be to implement) and the potential impact (how much value it could provide).
- Rate each use case based on factors like:
 - **Feasibility:** Does the organization have the resources to support this use case? Is there data available to train the AI effectively?
 - **Impact:** Will this use case significantly improve services for tenants or donors? Will it save staff time and resources?
- Example:** Creating automated tenant notifications (like rent reminders or maintenance updates) may have high impact and be easy to implement, making it a strong candidate.

4. Prioritize Use Cases

- Once you've evaluated each use case, prioritize them based on a combination of feasibility and impact. Start with high-impact, low-complexity use cases—these are often “quick wins” that can provide immediate value.
- Example:** If tenant inquiries are a high-priority pain point, consider starting with an AI tool to assist with tenant questions, which can save time for both tenants and staff.

5. Develop a Pilot Program

- Start small with a pilot to test the top-priority use case(s). This allows you to assess the effectiveness and address any issues before scaling.
- Plan a pilot for a set period (e.g., 3–6 months) with clear objectives and metrics to evaluate success.
- Example:** Pilot a Gen AI chatbot for common tenant questions, track response times and satisfaction, and get feedback from both tenants and staff.

6. Collect Feedback and Measure Success

- Throughout the pilot, gather feedback from tenants, staff, and other stakeholders. Use surveys, interviews, or data on usage and response times to see if the AI solution is making a difference.
- Measure key performance indicators (KPIs) like response time improvements, satisfaction ratings, or the amount of time staff saves.

- Example:** For the AI chatbot pilot, ask tenants if they found the answers helpful and if it improved their experience. Track how much it reduced staff workload on repetitive inquiries.

7. Refine and Expand the Use Case

- Based on feedback and the results of the pilot, refine the AI solution. Make improvements or adjustments to better meet tenant and staff needs.

- If the pilot is successful, consider expanding the use case to serve more tenants or adding additional capabilities.

- Example:** If the chatbot pilot is successful, expand it to cover more types of tenant inquiries or add options for tenants to request specific maintenance tasks through the AI tool.

8. Document and Share Best Practices

- Document the process, lessons learned, and best practices to guide future AI initiatives. This makes it easier for the organization to replicate the process and avoid potential pitfalls.

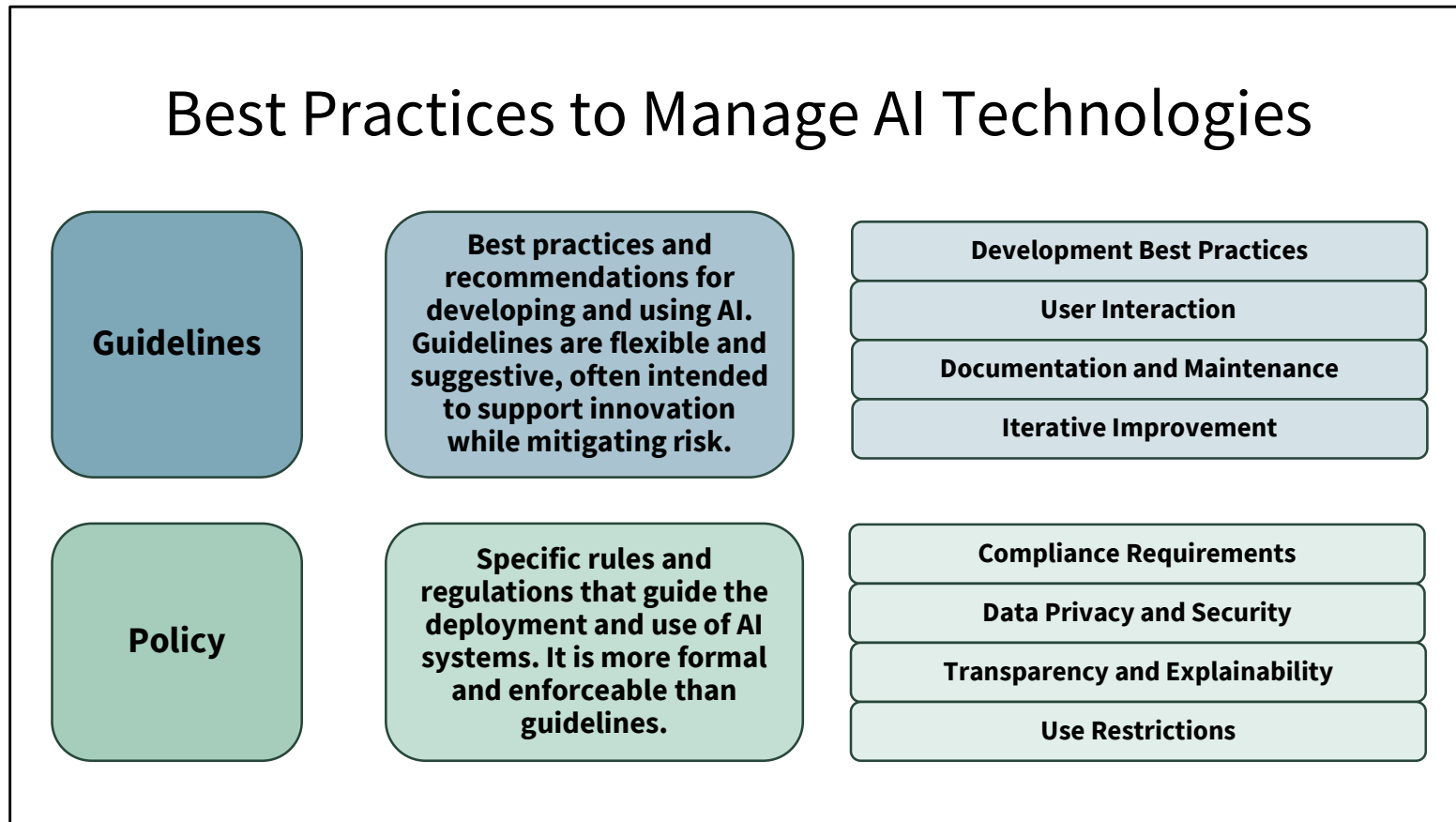
- Example:** Create a guide on how the AI chatbot was developed, challenges faced, and how feedback was used to make improvements.

9. Continue Evaluating and Scaling as Needed

- Regularly review and measure the AI solution's performance over time. As needs evolve, consider scaling or adapting the use case further or developing new ones to meet emerging challenges.

- Example:** As tenant needs grow, you might add other Gen AI tools, like automated maintenance scheduling or data analysis to better understand housing trends and needs.

Best Practices to Manage AI Technologies



AI Guidelines are advisory best practices and recommendations for developing and using AI. Unlike policies, guidelines are flexible and suggestive, often intended to support innovation while mitigating risk. Guidelines may cover:

- **Development Best Practices:** Recommendations for data handling, model training, and validation processes.
- **User Interaction:** Suggestions for designing AI interfaces that prioritize usability, transparency, and ethical considerations.
- **Documentation and Maintenance:** Advising teams on the documentation standards and ongoing maintenance of AI systems.
- **Iterative Improvement:** Encouraging regular updates, monitoring, and fine-tuning of AI models to keep them aligned with evolving best practices.

AI Policy encompasses specific rules and regulations that guide the deployment and use of AI systems. It is more formal and enforceable than guidelines. Policies may include:

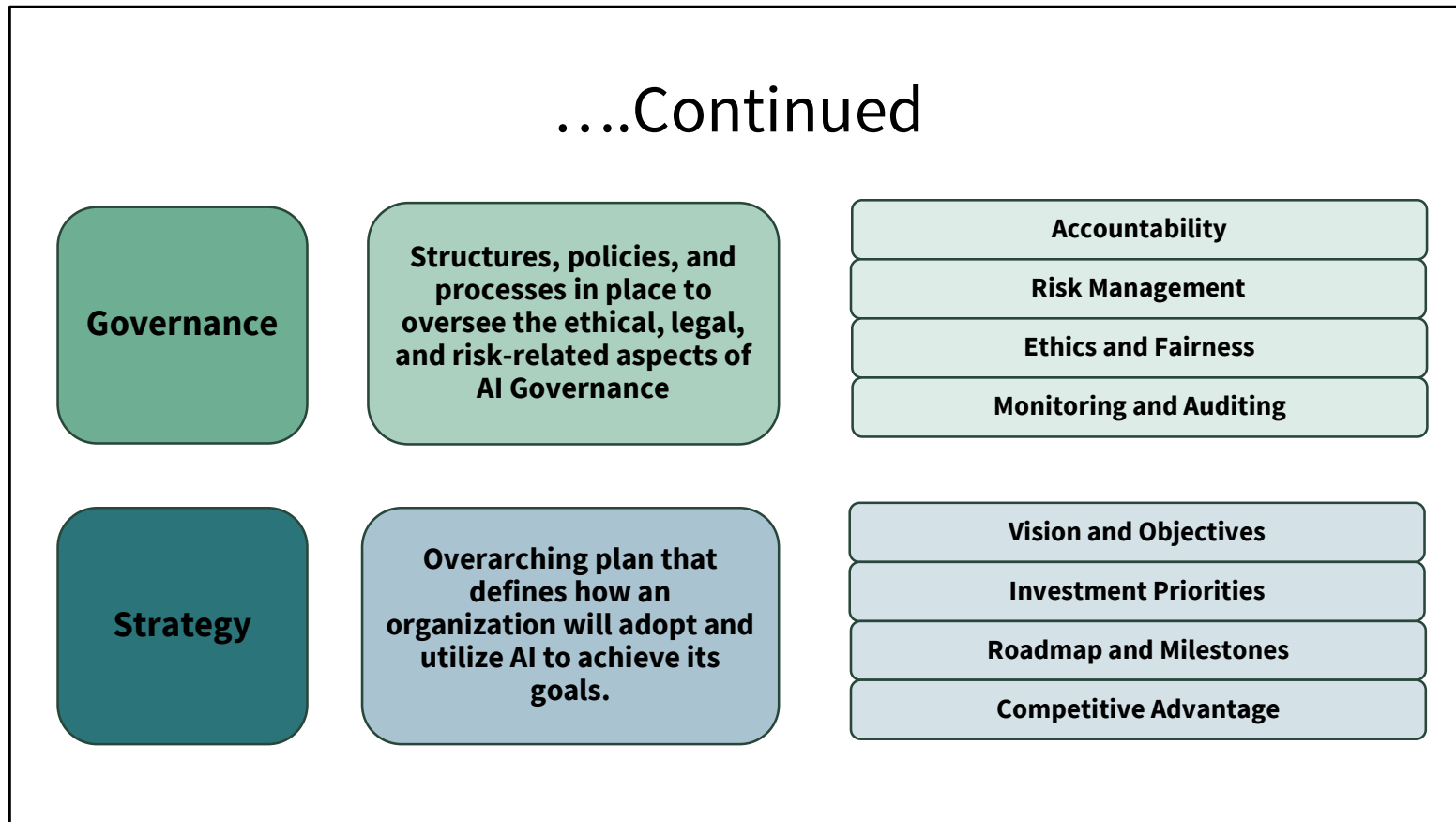
- **Compliance Requirements:** Rules to ensure that AI systems adhere to local, national, and industry-specific laws and standards.

- **Data Privacy and Security:** Policies on how AI models can use data, with a focus on safeguarding user privacy and information.

- **Transparency and Explainability:** Requiring that AI decisions can be explained and understood by stakeholders, especially in regulated industries.

- **Use Restrictions:** Defining what AI applications are permitted or prohibited, such as the use of AI for sensitive tasks.

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2. AI Governance

AI Governance refers to the structures, policies, and processes in place to oversee the ethical, legal, and risk-related aspects of AI. Governance includes:

- **Accountability:** Establishing roles and responsibilities for AI initiatives, often involving cross-functional teams from IT, legal, ethics, and business units.
- **Risk Management:** Implementing measures to address risks associated with AI, including bias, security, and compliance with regulations.
- **Ethics and Fairness:** Ensuring AI applications align with ethical standards, protecting against bias, discrimination, and harm.
- **Monitoring and Auditing:** Creating mechanisms for ongoing oversight and regular audits to ensure AI models are

performing as intended.

AI Strategy is the overarching plan that defines how an organization will adopt and utilize AI to achieve its goals. It focuses on:

- Vision and Objectives:** Outlining long-term goals for AI, including how AI will drive innovation, productivity, or customer experience.

- Investment Priorities:** Identifying areas for investment, research, and development to achieve AI goals.

- Roadmap and Milestones:** Setting a timeline with specific phases and deliverables for AI initiatives.

- Competitive Advantage:** Determining how AI will differentiate the organization within the market or sector.

The AI strategy is often tied to the broader business strategy and sets the foundation for AI initiatives.

Key Takeaways

- **Develop a clear understanding within your organization of what generative AI is, its principles, how it differs from other types of AI, and its transformational potential**
- **Become aware of the ethical considerations surrounding the use of generative AI**
- **Understand risks/challenges and develop mitigation strategies**
- **Enable strategic planning for integrating generative AI into the organization**
- **Start small and work your way up**
- **Develop metrics to evaluate the effectiveness of generative AI solutions**