WIPFLI



WISCAP

Poverty Matters Conference



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WISCAP Poverty Matters Conference

AI - No Longer a Future Concept

The real possibilities of AI for your agency.

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OPENING

The moment we are in

01 **The tools got good. Really good.**

02 **Your funders are already asking about it.**

03 **Your staff are already using it, with or without a policy.**

> The question is not whether AI enters your agency. It is whether it enters on your terms.

OPENING

The three altitudes

1 · PERSONAL

One person, better and faster at their own work

2 · DEPARTMENTAL

A team redesigns a workflow around AI

3 · ORGANIZATIONAL

The agency changes how it delivers services

Most organizations are stuck at level 1. The value lives at levels 2 and 3.

OPENING

What AI is (and is not) in plain English

AI IS

A very well-read colleague

Instant, and never tired

In need of supervision

AI IS NOT

A database

A search engine

A decision maker

It predicts good next words based on everything it has read. You supply judgment, context, and accountability.

ALTITUDE 1 · PERSONAL PRODUCTIVITY

YOU, BUT FASTER

Ten hours a month per knowledge worker is the floor, not the ceiling.

1

ALTITUDE 1

The five verbs of personal productivity

Draft	First versions of emails, letters, job postings, grant sections
Summarize	Meeting notes, monitoring reports, RFPs, 60-page regulations
Translate	Federal-speak to plain English, English to Spanish, expert to board-level
Reformat	Notes to minutes, spreadsheet to narrative, narrative to bullets
Explain	“What does this Uniform Guidance clause actually mean for us?”

None of this requires new software. It requires new habits.

ALTITUDE 1

Prompting that actually works

Role | Task | Context | Format

WEAK

“Write a thank-you letter.”

STRONG

“You are a development director at a Community Action Agency. Write a thank-you letter to a first-time $500 donor who gave to our weatherization program. Warm but not gushing, under 200 words, mention that their gift covers air sealing for one home.”

ALTITUDE 1

Where personal AI pays off first

Executive Director	Board memos, funder correspondence, testimony drafts, contract review questions
Finance	Variance narratives, plain-English policies, journal entry descriptions, audit prep checklists
HR	Job descriptions, interview questions, policy updates, performance review drafting support
Program staff	Case note cleanup, family communication drafts, curriculum adaptation, report narratives
Development	Donor letters, grant narrative first drafts, event copy, prospect research summaries

Client PII and personnel data go in approved, protected tools only. Never a free consumer account.

ALTITUDE 1

The Level 1 trap

Individual productivity is where AI adoption goes to feel good and stall out.

1

Gains are invisible in the budget

2

Knowledge stays in individual heads

3

No process actually changed

ALTITUDE 2 · DEPARTMENT AND WORKFLOW TRANSFORMATION

THE DEPARTMENT REDESIGNS THE WORK

2

Stop asking “how do I use AI?” Start asking “where does this workflow wait, repeat, or rekey?”

ALTITUDE 2

Anatomy of a workflow transformation

BEFORE 5 handoffs · days of elapsed time

Intake form → Manual review → Rekey into system → Draft response → Supervisor review → Send

AFTER 2 handoffs · hours of elapsed time

Intake form → **AI drafts and pre-checks** → Human reviews and approves → Send

The human does not disappear. The human moves to the decision point.

ALTITUDE 2

Four department playbooks

Finance and grants

Grant report narratives from GL exports · monthly variance explanations · procurement pre-checks against thresholds

Program operations

Family outreach in multiple languages · case note summarization for supervision · self-assessment evidence organization

HR and workforce

Consistent screening questions · onboarding content from policy manuals · policy handbook Q&A assistant for staff

Development and communications

Proposal assembly from a content library · donor segment messaging · annual report drafts from program data

ALTITUDE 2

What made that work (it was not the AI)

1. **A defined template and a gold-standard example**
2. **Written standards the AI must follow**
3. **Clean, structured input data**
4. **A named human decision point**

AI amplifies your process maturity. If the process is chaos, AI gives you faster chaos.

ALTITUDE 2

Measuring departmental wins

CYCLE TIME

Report drafting from 5 days to 1

REWORK

Funder-requested corrections down

COVERAGE

Monitoring checklists run 100 percent of the time

CAPACITY

Hours redeployed to client-facing work

Pick the metric before the pilot, not after.

Altitude 2 have the same limitations: the AI only knew what we handed it.

What if it already knew your data?

ALTITUDE 3 · AGENCY-WIDE TRANSFORMATION

THE AGENCY THAT TALKS TO ITS OWN DATA

Private. Governed. Connected to your systems. Answering your questions.

3

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ALTITUDE 3

The architecture, in one picture

Your systems

Financial system, case management, HR, document repositories

→

A governed data layer

Data cleaned, secured, and permissioned

→

A private AI assistant

Answers questions, drafts reports, surfaces trends

→

Your people

Every authorized staff member, from their desk

The AI never sees more than the person asking is allowed to see.

ALTITUDE 3

What changes when the agency can ask

Leadership	Decisions move from “request a report” to “ask a question”
Boards	Dashboards that answer follow-up questions instead of static PDFs
Compliance	Monitoring prep in days, evidence retrieved conversationally
Programs	Trends surfaced early: enrollment dips, attendance patterns, service gaps
Front door	Intake that answers on the first ring, screens eligibility, routes warm handoffs to humans

ALTITUDE 3

The honest prerequisites

1 · Data hygiene

Your systems agree on what a “family served” is

2 · Governance

An AI policy, a data classification, named accountability

3 · Security posture

Identity, access, and logging fundamentals in place

4 · A funded plan

This is a project, not a subscription

None of these are exotic. All of them are work.

ALTITUDE 3

Governance is the enabler, not the brake

The minimum viable AI governance stack for a federally funded nonprofit:

1. **An acceptable use policy staff have actually read**
2. **Data rules: what may and may never go into which tools**
3. **Human accountability: a person signs everything that leaves the building**
4. **Vendor vetting: enterprise terms, no training on your data**
5. **Documentation: decisions logged like any other compliance artifact**

Policy before problems.

ALTITUDE 3

The two-year picture

MONTHS 0 TO 3

Policy, training, personal productivity rollout with protected tools

MONTHS 3 TO 9

Two departmental workflow pilots with measured results

MONTHS 9 TO 18

Data layer and private assistant pilot in one domain, starting with finance

MONTHS 18 TO 24

Expand the connected assistant, AI-assisted intake, board reporting

Crawl, walk, run. But actually crawl. Most agencies skip the crawl and then wonder why they are lying down.

LANDING

What could go wrong (because something will)

Hallucination

Human review on anything external; AI audits AI

Privacy breach

Approved tools only; train on data rules; log usage

Over-reliance

AI drafts, humans decide; keep expertise exercised

Staff fear

Be explicit that the goal is capacity, not headcount

LANDING

Your Monday morning list

1. Pick your protected tool and get enterprise terms
2. Draft (or dust off) your AI acceptable use policy
3. Run one lunch-and-learn using the five verbs
4. Pick one departmental workflow and one metric for a 60-day pilot
5. Ask your finance and IT leads the Altitude 3 readiness questions

TURN TO A NEIGHBOR · TWO MINUTES

What is the one workflow in your agency you would redesign first, and what is the metric?

LANDING

How Wipfli helps

AI readiness and maturity assessment

Governance policy development and board education

Departmental workflow pilots with measurement

Data strategy and private AI assistant implementation

Training series for leadership and staff

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THE CLIMB AHEAD

The agencies that serve the most families in 2030 will not be the ones with the biggest budgets. They will be the ones that bought their hours back.



Thank you.

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