

Guidance for Reporting on AI Use Case Explorations

About This Document. This document provides guidance for teams who have been exploring potential AI use cases within the organization. The goal of this reporting is to share your learnings, insights, and progress with others, fostering a culture of knowledge sharing and informed decision-making around AI adoption. Please use this framework to structure your report-back, building upon the initial "AI Use Case Outline" you utilized. This document aims to support you in articulating the outcomes of your initial AI explorations for both your team's reflection and for communication to others within the nonprofit.

1. Use Case Title (Reference):

Description: Clearly state the title of the use case you have been exploring (as defined in your initial "AI Use Case Outline" document). This ensures clarity and allows for easy referencing.

2. Team Members (Reporting):

Description: List the individuals who were actively involved in exploring this use case and contributing to this report.

3. Summary of the Initial Use Case:

Description: Briefly restate the original problem statement/opportunity and the initial ideas for how AI might be applied. This provides context for those who may not be familiar with the initial outline.

4. Key Learnings and Discoveries:

Description: This is the core of your report. Detail what your team has learned through your initial exploration with the AI tools. Be specific and provide examples where possible.

To Consider:

- What specific AI tools or features did you experiment with?

- What were the most promising applications or functionalities you discovered?
- What were some limitations or challenges you encountered with the AI tools for this use case?
- Did the AI perform as expected based on your initial ideas? If not, how did it differ?
- Did you uncover any unexpected ways the AI could be helpful (or not helpful)?
- What kind of prompts or inputs seemed to yield the best results?
- How intuitive or user-friendly did the AI tools feel for this specific application?

5. Impact on the Problem/Opportunity:

Description: Based on your initial exploration, discuss the potential impact of using AI for this use case. Be realistic and differentiate between observed results and potential future impact.

To Consider:

- Did you see any initial signs of increased efficiency or time savings?
- Did the AI contribute to any improvements in the quality or consistency of work?
- Do you believe that further development of this use case could lead to significant benefits? If so, how?
- Are there any qualitative observations about the impact on team morale or focus?

6. Data Insights and Requirements (Refined):

Description: Based on your experimentation, provide more specific insights into the data needed for this use case.

To Consider:

- What types and formats of data were most useful when working with the AI?
- Did you identify any data quality issues or gaps that would need to be addressed for successful implementation?
- Did your exploration raise any new questions or concerns about data privacy or security?

7. Challenges, Risks, and Ethical Considerations (Observed and Anticipated):

Description: Elaborate on any challenges, risks, or ethical considerations that became apparent during your exploration.

To Consider:

- Did you encounter any biases or unexpected outputs from the AI?
- What are the potential implications for staff roles and responsibilities if this use case is further developed?
- Are there any ethical considerations related to fairness, transparency, or accountability that need to be addressed?

8. Potential Metrics for Success (Refined):

Description: Based on your initial findings, suggest more specific and measurable metrics that could be used to track the success of this AI application if it were to be fully implemented.

To Consider:

- What quantifiable KPIs could be used to measure the impact (e.g., time saved per task, increase in content output, improvement in response times)?
- What qualitative indicators might also be important to track (e.g., user satisfaction, staff feedback)?

9. Next Steps and Recommendations:

Description: Based on your learnings, provide clear recommendations for next steps regarding this use case.

To Consider:

- Do you recommend further exploration or a pilot project?
- What specific actions should be taken next?
- What resources (time, personnel, potential budget) might be needed for the next phase?
- Are there any specific teams or individuals who should be involved in future discussions?
- Should this use case be prioritized, and if so, why?

10. Open Questions and Further Inquiry:

Description: List any remaining open questions or areas where further investigation is needed. This encourages continued learning and collaboration.

Guidance for Reporting:

- **Be Specific and Use Examples:** Whenever possible, illustrate your points with concrete examples of how you used the AI and the results you observed.
- **Be Honest and Balanced:** Report both successes and challenges. A balanced perspective provides a more accurate and valuable understanding.
- **Focus on Learnings:** The primary goal is to share what you've learned, even if the initial experiment didn't yield the desired outcome. Negative results can still provide valuable insights.
- **Consider Your Audience:** Keep in mind that your report will likely be shared with individuals who may not have the same level of familiarity with AI. Use clear and concise language, avoiding overly technical jargon.
- **Collaborate on the Report:** Ensure that all team members contribute to the report to provide a comprehensive overview of your collective experience.