ASSOCIATION INSIGHTS CENTER

Navigating the Impacts of Artificial Intelligence (AI)

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How to Use this Deck

- Use the following slides to introduce a discussion on navigating the impacts of artificial intelligence.
- Customize the slides as needed. It’s likely that some aspects of artificial intelligence discussed here are more relevant to your association than others. You can add your branding, revise text, and insert new slides.
- This deck takes approximately 15-20 minutes to present.

What is the Association Insights Center?

A *community of experts collaborating to face the increasingly complex environment and challenges ahead.* The AIC provides critical, on-demand intelligence and tools to support association CEOs as they face the tough decisions yet to come.

The slides that follow provide a synthesis of the community's work in 2023 to support CEOs in guiding Boards of Directors to discuss their approach to AI.

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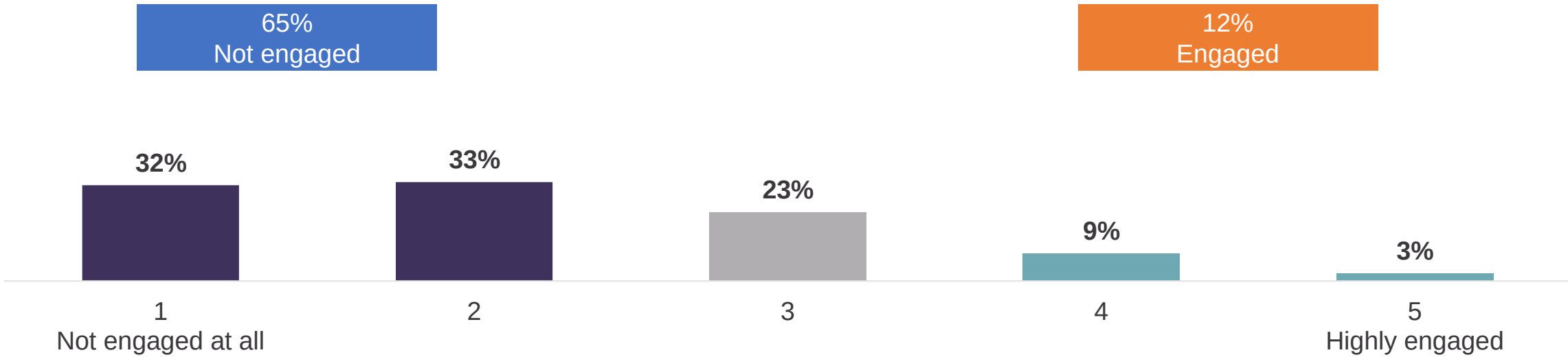
Introducing AI to Your Board

Internal Operations Engagement

Only 12% of associations engaged with AI today

How would you rate the level of engagement with artificial intelligence (AI) within your association? (Please consider internal operations, but not how the field you represent may be using AI.)
n=381; Base: All respondents



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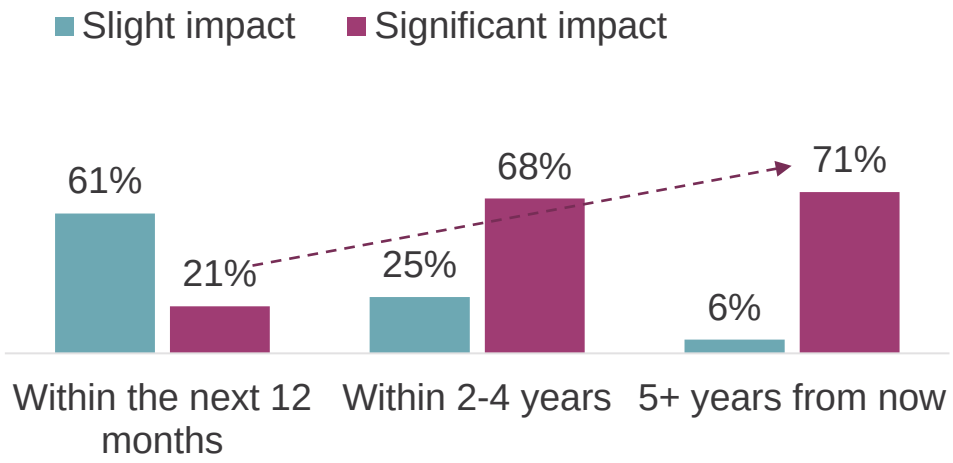
Future Impact of AI

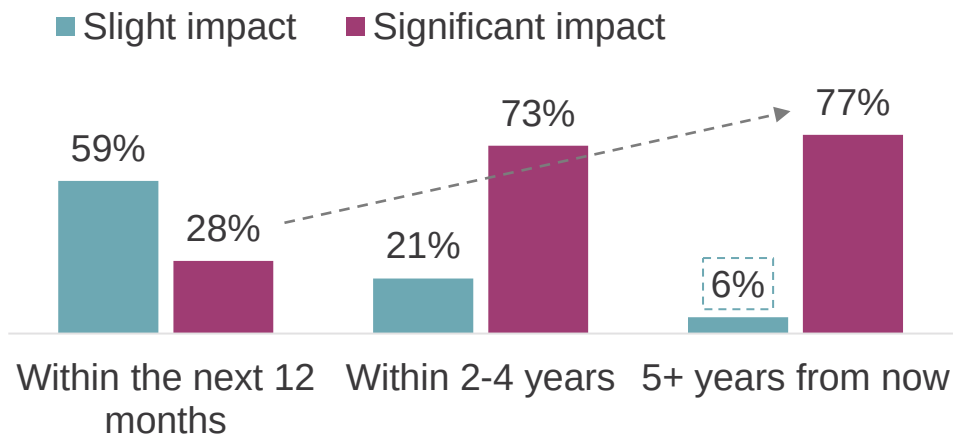
AI will have more significant impact over time

How much of an impact do you believe AI will have on:
n=379; Base: All respondents

Your association's programs, activities and operations



Field your association represents



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How are Associations Utilizing AI Today?

Answer: Generally for drafting and ideation at a basic level

Common & Basic Use Cases

1. Ideation
2. Checking/Rewriting Copy
3. Creating Headlines
4. Outlines/Drafts/Letters
5. Notetaking

Advanced Use Cases

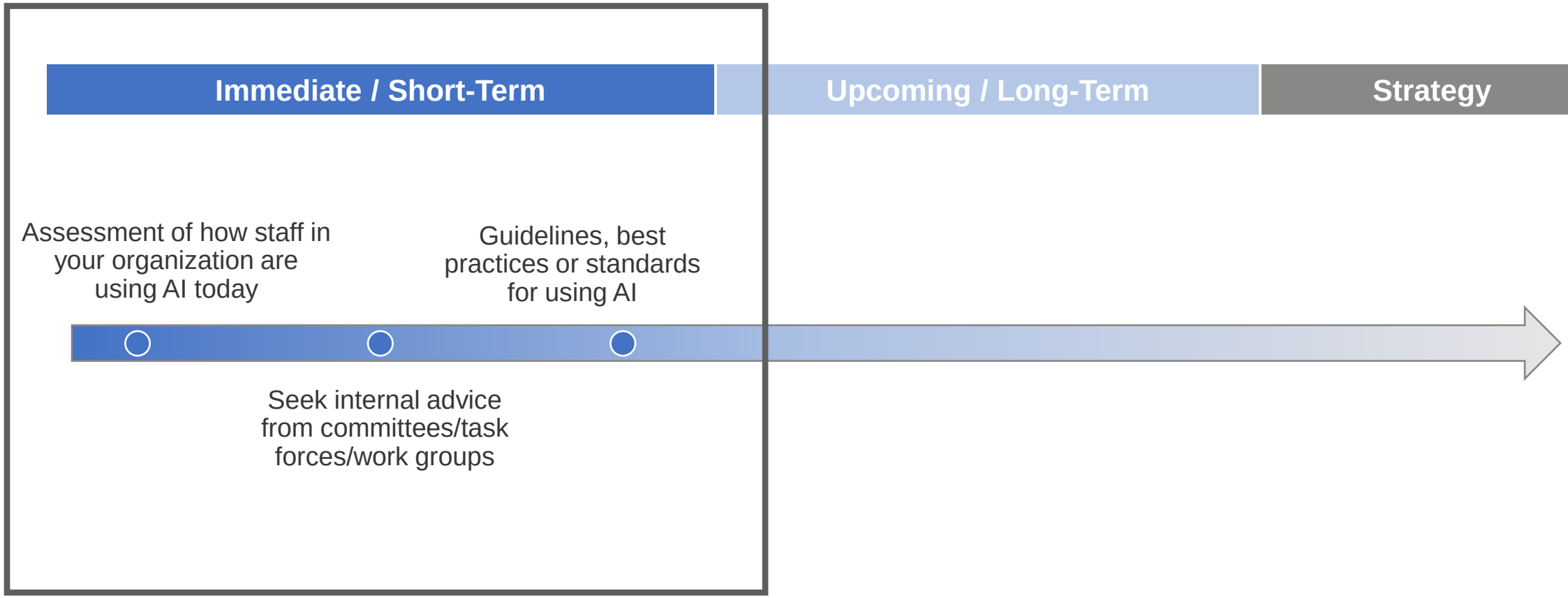
6. Recommendation Systems
7. CX, Navigation, e-payment
8. Fraud Detection/Phishing
9. Marketing Automation
10. Debugging Software

Avenues and Interfaces

11. Chatbots & Website
12. HubSpot
13. ChatGPT and general software (e.g., Dall-e)

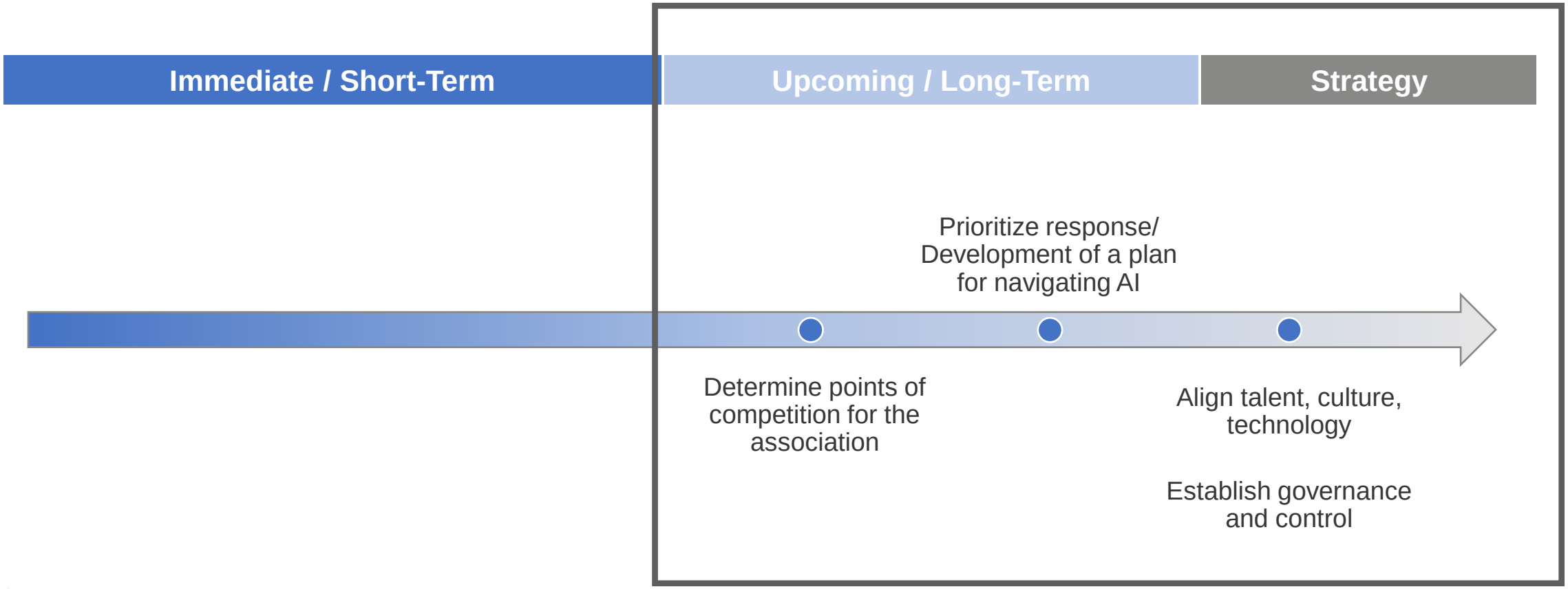
Navigating AI as an Association Leader

A Model for Approaching the Issue: Short-Term



Navigating AI as an Association Leader

A Model for Approaching the Issue: Long-Term



See PwC: What's the real value of AI to your business and how can you capitalize?

Navigating AI as an Association Leader

Getting Started with AI: Key Questions for Board Leadership

- How does AI impact our field/industry currently?
- Where are the greatest opportunities for disruption resulting from AI in our field, and how will that impact our association's members and business model?
- What is the current level of AI adoption among members?
- What is our tolerance for risk? Our members?
- How does AI integrate into our existing strategy?
- What might be the consequences of doing nothing?
- What are likely to be the biggest areas of priority for members?
- How will we invest in AI?

Navigating AI as an Association Leader

Getting Started with AI: Key Questions Staff Leadership

How is AI currently being used across the association?	What level of risk are we comfortable with? Are we aiming to be an early adopter, fast follower or follower?	How can we protect the association and our intellectual property?	How can we prevent AI from amplifying biases?	How can we support and guide staff in this exploration?
What stakeholder voices are we missing in the conversation?	What skillsets do we need to engage around this? Are they available to us now?	What are the biggest areas of priority for us internally?	What might we need to change in our current operations?	What resources or support do we need to lead on AI?

Harnessing the Power of AI

> You’ve got to use the “new thing” to do old things better. Then, you use the new thing to … do new things.”

C.Young (2023). *Build a Winning AI Strategy for your Business*. Harvard Business Review. https://hbr.org/2023/07/build-a-winning-ai-strategy-for-your-business

Leading on AI

Stage/Domain	Considerations

Evaluate AI for your association and field	• Conduct a scan of technological developments and competitive pressures:
	  • When will they arrive?
	  • How will we respond?
	  • How can AI support the association and field in addressing concerns?
	• What disruptive opportunities are opened up by the AI that's available now and what is on horizon?

Prioritize your response	• How can different AI options help you deliver on the association's goals? The field's priorities/ opportunities?
	  • What is your appetite and readiness for change?
	  • Do you want to be an early adopter, fast follower, follower?
	• Is your strategic objective to transform the association's business or disrupt your competitors? For the field?
	• How will you balance AI and ethics?
	  • Consider ethical management and accountability of human and organizational values, biases and discrimination.

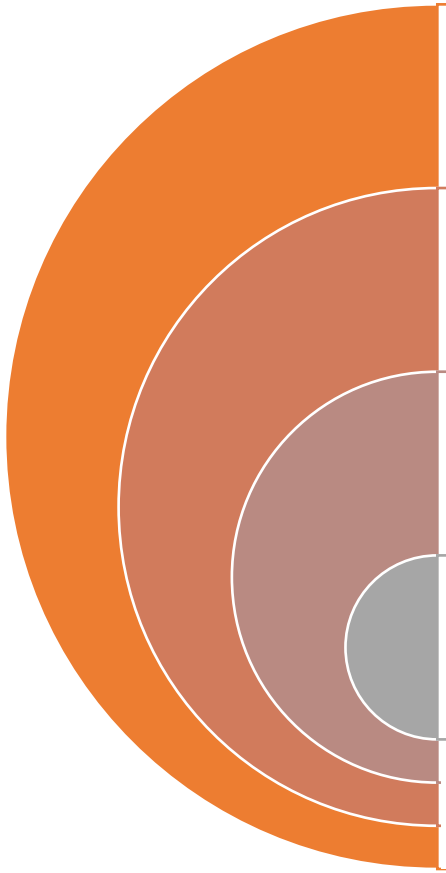
Align tech, talent and culture	• How can we prepare our workforce to work side-by-side with AI?
	  • Do we have the right systems and (data-driven) culture in place?
	  • What role will staff play in this new hybrid model?

Develop organizational policy	• Design strategies, policies and process around AI
	  • Protect against reputational risk.
	  • Ensure fairness.

See PwC: What's the real value of AI to your business and how can you capitalize?

Building a Winning AI Strategy

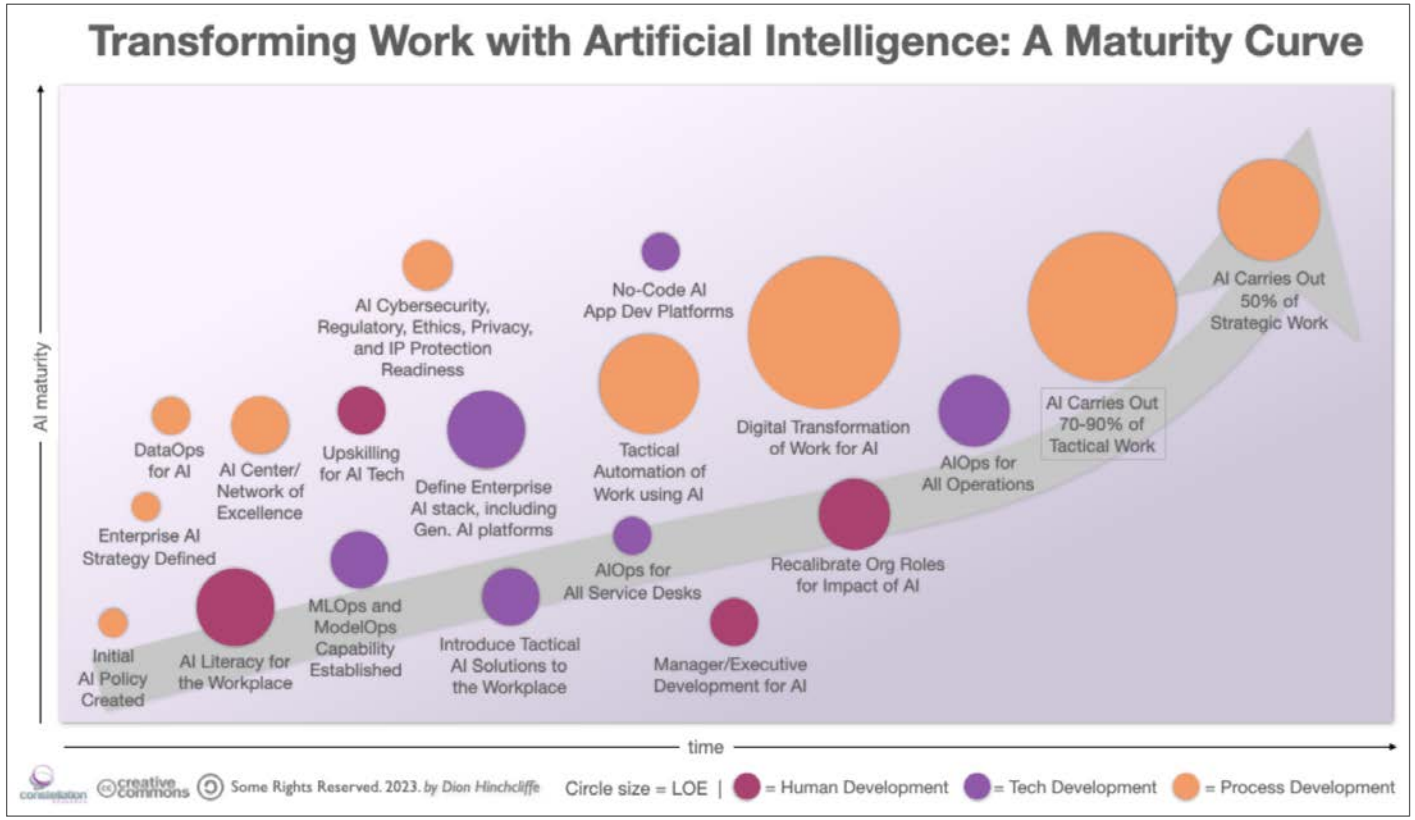
Prioritize security and responsible AI at each stage

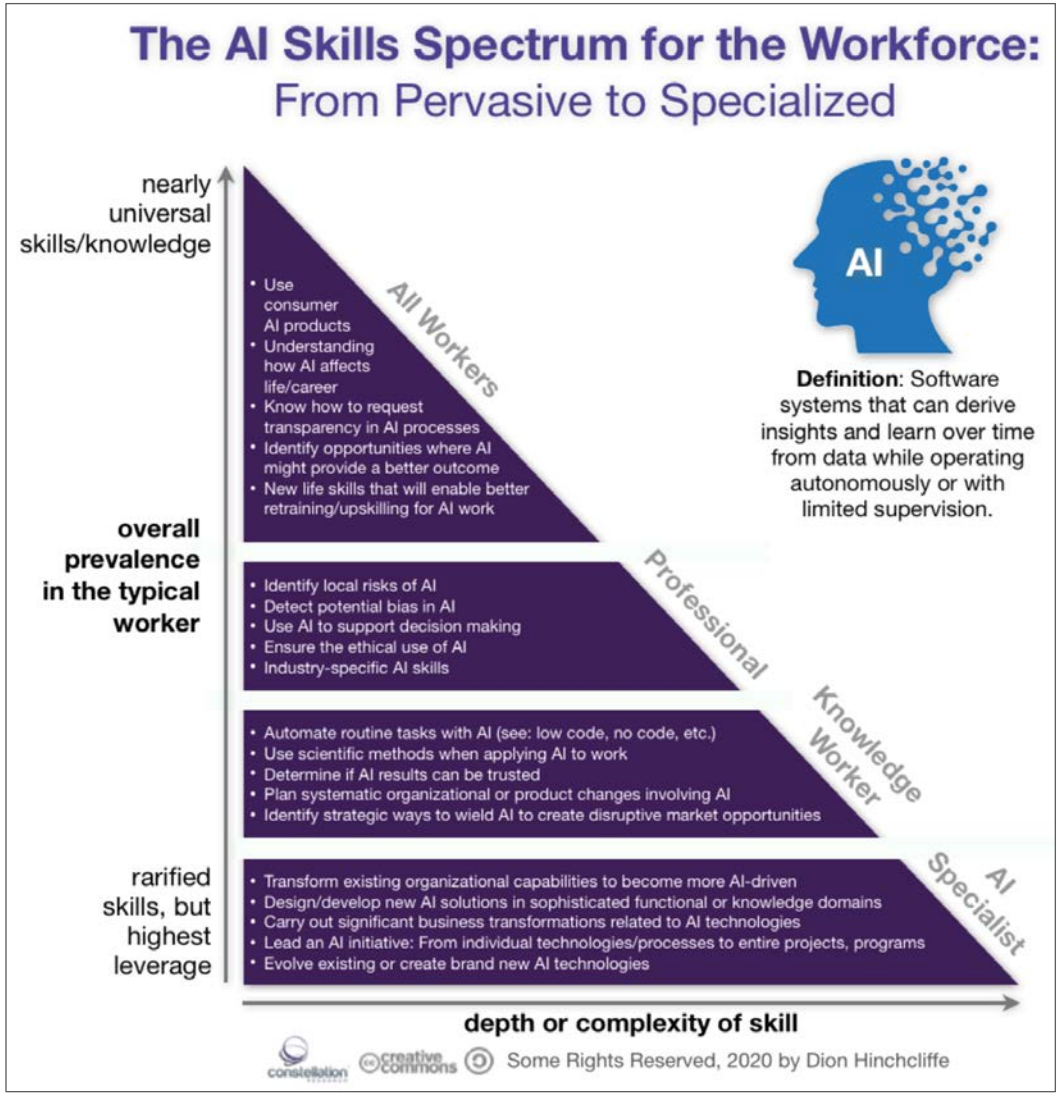


Build New Things	• Consider what you can do that's completely different with AI, how you can delight members and create new lines of business with them. • Integrate AI into your organization and iterate from there to define what this looks like.
Transform Experiences	• Use AI to leverage resources or information you already have to transform experiences for staff and members. • Use AI to deliver experiences that are better, faster, more efficient, or entirely new, from chatbots on websites to suggested searches on your website.
Deploy for Productivity	• Consider the workflows and process-driven activities in your business (e.g., payroll, onboarding, IT help desk support, marketing, note-taking) to see how AI can streamline business processes. • Use AI to shorten the amount of time it takes to comb through data.
Experiment	• First, set organizational guardrails to protect the association from risk. • Try popular applications like ChatGPT, Google Bard or the new Bing. • Try applying AI to your work (e.g., research and summarize a topic, write a memo, generate interview questions).

C. Young. (2023). *Building a Winning AI Strategy for Your Business.* Harvard Business Review. https://hbr.org/2023/07/build-a-winning-ai-strategy-for-your-business

AI Maturity and AI Skills Spectrum- Dion Hinchcliffe





Hinchcliffe, D. (2023). *How to embark on the transformation of work with Artificial Intelligence*. On Digital Strategy | Dion Hinchcliffe. https://dionhinchcliffe.com/2023/08/04/how-to-embark-on-the-transformation-of-work-with-artificial-intelligence/

Sample Step-by-Step Guide: Beginner

Prioritize security and responsible AI at each stage

1. Form a task force (cross-departmental and/or volunteers) to assess how AI is being used today and explore AI needs (bottom up) or appoint a tech chief or AI council to monitor AI and/or determine how AI should be implemented (top down).
   - Additional Task Force Charges: risk management, ethics, DEI.
2. Develop guidelines, best practices or standards for using AI
3. Consider possible applications and different use cases (e.g., chatbot on website, business writing, automation).
4. Experiment with AI tools and functionality (e.g., ChatGPT, ChatAible).

Sample Step-by-Step Guide: Intermediate

Prioritize security and responsible AI at each stage

1. Develop organizational AI strategy.
2. Purchase out-of-the-box AI technology or develop in-house technology to implement AI strategy.
3. Deploy AI across the association to boost productivity and automate/streamline processes.
4. Execute AI strategy in targeted functional areas to transform member experiences (e.g., publications, marketing, education).

Sample Step-by-Step Guide: Advanced

Prioritize security and responsible AI at each stage

1. Conduct research to explore how AI can make possible what's impossible today (internal and/or industry research).
2. Align talent, culture and technology to capitalize on AI.
3. Educate members on implementing AI in your field/industry.
4. Identify and advocate for legislative needs required to fully adopt AI in the field/industry your association represents.

Case Studies

Case Study: Deloitte

- Deloitte created the Artificial Intelligence Center of Expertise (AICE) to bring together all of its projects and initiatives in the area of artificial intelligence. Bringing together people from different functional areas helps to accelerate learning and knowledge transfer.
- To stay connected with the AI external community, Deloitte hosts Meetups and hackathons to stay up to date with the latest technical developments and prioritize continuous learning.
- To increase awareness to the possibilities offered by AI, Deloitte launched an in-house campaign to educate employees. This included an “AI for dummies course” which the CEO took part in.

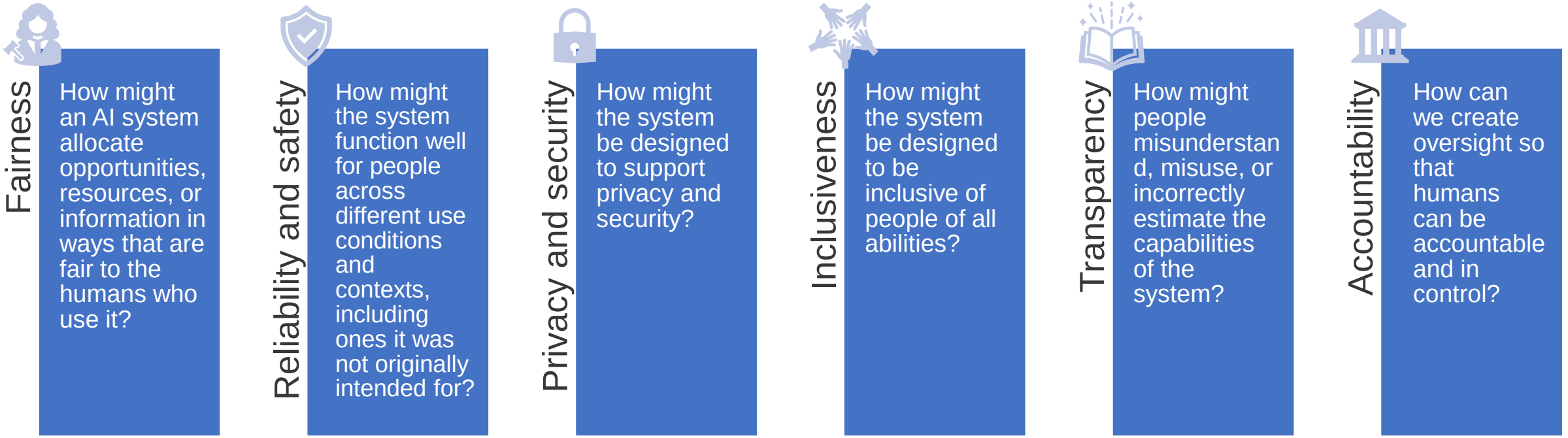
16 Artificial Intelligence projects from Deloitte. Practical cases of applied AI. https://www2.deloitte.com/content/dam/Deloitte/nl/Documents/innovatie/deloitte-nl-innovatie-artificial-intelligence-16-practical-cases.pdf

Deloitte Case Study: Applied to Associations

- Initiate cross-functional staff and/or members working groups to learn about AI applications, implementation and results.
  - Staff: What is working? What are the risks? What are the results?
  - Members: What AI tools are emerging in the field? How effective are they? What are the impacts of these tools?
- Host meetups or hackathons virtually or onsite at conferences to explore new technologies, identify learning needs and facilitate community around these technologies.
- Develop content for a spectrum of learners – beginners to advanced – to bring both staff and members along on the journey, building loyalty to the association and positioning the association as a leader on the issue.

Case Study: Microsoft

- To ensure AI systems are developed responsibly, Microsoft developed a set of principles to guide internal AI development and use (Microsoft's six AI principles).
- Microsoft created a "Responsible AI Standard" to serve as a framework for translating their six principles into actionable guidance for engineering teams.



Microsoft Case Study: Applied to Associations

- Develop principles to guide the use of AI that are aligned to your mission and values. How will you evaluate the responsible use and development of AI within your association?
- Form a cross-functional task force or work group to translate the association's AI principles into actionable guidance to help staff and/or members deploy AI responsibly.
  - Key areas to address: impact, security, equity, benefits/risks, accountability.
  - *Note: Microsoft engaged 30+ subject matter experts in a multi-year effort to develop the Responsible AI Standard which includes the 6 principles and 17 goals.*

Use Cases

Marketing

- **Draft and copyedit:** Associations are using AI tools to help write content for the website, newsletters, brochures, memos, member prospecting materials and other communications.
- **Art and imagery:** AI is being used to generate visual web content and voiceovers for marketing (and educational) videos.

"We have adopted chatGPT, other LLM AI programs, and AI art programs such as Dall-e to help create web content, brochures, marketing materials, integrated with our email and newsletters."

"We currently use AI to prepare drafts of marketing communications and other messaging."

"Currently using ChatGPT to write marketing content, replies to enquiries, etc. Also using AI voiceover for marketing videos and learning activities."

Education

- **Draft, revise and summarize:** AI is being used to generate a first draft of training materials, author summaries, education descriptions and program titles as well as revise and expand case study scenarios for training and development.
- **Accessibility:** Associations are using AI to automate video transcription and offer live closed captioning for educational programs.

"Using ChatGPT and other AI platforms to research issues in the industry we represent and to assist association personnel in information for use in presentations."

"[We are] using AI against Cert exams and item bank to create new exam questions to test. Using Cert exams to create new exam prep book outlines and chapters. Using AI to draft content."

"We are also using AI to create SOPs and workflows to help standardize the delivery of programs, products, and services."

Publications

- **Streamline tasks:** AI tools are being used to prepare executive summaries, generate outlines, and draft articles in publications and blogs.
- **Image editing:** Some users are leveraging AI to touch up, edit and create images for print and online materials.
- **Screening information:** AI is being used for routine screenings (e.g., is information complete, do authors have proper permissions).

"We use AI to refine our writing in different styles, summarize information on a topic and provide clarity on complicated topics."

Additional Resources

Association Executives are Experimenting With Numerous AI Technologies, Including:

A. Accounting
   - Bill
   - Divvy

B. Data Analysis
   - ChatAible

C. Image Generation
   - Dall-E2
   - Magic Design (Canva)

D. Marketing
   - Contentware
   - Feathr
   - Rasa.io

E. Publishing
   A. iThenticate

F. Transcription
   - Otter.ai
   - Fathom

G. Varied
   - ChatGPT

Questions to Ask Potential AI Vendors

Provided by Erica Salm Rench, COO of rasa.io

A. How does your platform leverage AI? (Seems overly simplistic, but if they can't succinctly answer this one, red flag!)
B. What does your AI best optimize for?
C. How are you continually improving on the AI aspect of your product / what does your product roadmap look like?
D. What data is your AI trained on?
E. What KPIs does your solution impact?
F. How do the AI element and the human element work together?
G. What do your customers claim are the limitations of your platform?
H. How well does your platform talk to other big players in the marketing space (eg, HubSpot, Salesforce, Marketo, Zapier, etc.)?
I. How do you handle data privacy and security?
J. How long have you been around?
K. What kinds of customers do you serve?

ASAE Resources

Additional Resources for Learning

A. Establishing Guardrails Around the Use of Generative AI (2023)
B. Five Key Legal Issues to Consider When It Comes to Generative AI (2023)
C. AI for Associations: How to Supercharge Your Member Strategy (2022)
D. Get Comfortable with Artificial Intelligence (2022)
E. A Framework for Responsible Artificial Intelligence (2019)
F. As Artificial Intelligence Use Increases, Ethics Policies Needed (2019)
G. Is Your Association Ready to Support Artificial Intelligence? (2018)
H. Artificial Intelligence for Associations: Is It Worth the Hype? (2017)

Access additional resources here.

External Resources

Additional Resources for Learning

A. **Leading AI**
   A. PwC: What's the real value of AI for your business and how can you capitalize?
   B. WSJ: The Big Question for Managers on AI: Who Gets the Job of Figuring It Out?
   C. NPR: Lack of diversity in AI development causes serious real-life harm for people of color
   D. McKinsey: What every CEO should know about generative AI
   E. McKinsey: Technology's generational moment with generative: A CIO and CTO guide
   F. Deloitte: The AI Dossier (compelling use cases for AI in six major industries)
   G. HBR: How to Prepare for a GenAI Future You Can't Predict

B. **Managing Risk**
   A. KSG: Navigating the AI Risk Landscape
   B. Naylor Feature: Association Board and Technological Harm, Parts I and II

C. **Intellectual Property**
   A. HBR: Generative AI Has an Intellectual Property Problem
   B. US Copyright Office: Initiative to Examine AI

D. **Education/Professional Development**
   A. Strategies for Creating "Generative AI-Resistant" Assessments
   B. Codility Introduces AI-Resistant Assessment

E. **Sample/Model** Guidelines from ASAE (internal)

Access additional resources here.

Appendix

Please Contribute to ASAE Library of AI Case Studies and Use Cases for Associations

ASAE is requesting Association Executives contribute case studies and use cases to support the development of a robust library of resources on AI. This will be a living document, please add your examples to the Google Doc below:

https://docs.google.com/document/d/1c5lxQhAPAJ4Nn73edHspGgNd8EgDLCD3OhwOPXMgxhw/edit?usp=sharing

Key AI Terminology

- **Artificial Intelligence (AI).** Machine or software technology that mimics human intelligence. Rather than the computer following preset commands, AI can learn, recognize speech, plan, solve problems, and self-correct. Most AI used today is classified as weak or narrow AI, in that it is focused on a single or narrow set of tasks (a virtual assistant, for example). Strong AI, which is theoretical today, would be able to use its intelligence in a broad range of situations and perform well in all of them. (**Tech Terms**, **TechTarget**, **Skymind**, **Techopedia**)
- **Deep learning (DL):** A subcategory of machine learning. The most advanced cognitive machine is the human brain, which is a network of neurons that fire together. Deep learning mimics the way a human's neural networks function in terms of how information is transmitted. (**Associations Now**)
- **Generative AI:** Generative AI is a category of artificial intelligence model designed to generate new data. These models are trained on large data sets that teach them to identify patterns and structure in text, images, video, and audio. Once trained, their algorithms can generate new data with similar properties in response to user input. Different models can generate paragraphs of natural-sounding text, render images in different artistic styles, or create audio samples. (**Tech Terms**)

Childress, R. (2019). *25 Tech Terms Every Association Pro Should know*. ASAE. https://www.asaecenter.org/asae-home/resources/articles/an_magazine/2019/may-june/25-tech-terms-every-association-pro-should-know

Key AI Terminology, Cont.

- **Large Language Models (LLM):** Generative text models (also called large language models) can generate blocks of text based on a user prompt. Even though the output may look like a person wrote it, generative text is really a form of advanced predictive text. The model generates one word at a time, predicting the next word in a sequence based on its training material. Given a large enough set of data, generative language models can generate essays, song lyrics, or even functional source code in multiple programming languages. (**Tech Terms**)
- **Machine learning (ML):** A subset of AI, ML is the use of algorithms to help machines "learn" new information without having to be programmed. Machine learning guides things like product recommendations a user gets based on past purchases. (**Tech Target**, **Techopedia**)
- **Natural language processing (NLP):** A subset of AI, NLP allows machines to understand human language as it is spoken. NLP is used both in systems that understand human commands, like Alexa or Siri, and in systems that read text. (**TechTarget**, **Techopedia**)
- **Predictive Analytics:** One category of machine learning includes using predictive analytics to help an organization figure out what factors influence things like revenue and sales. In the association space, similar algorithms can be used to predict how factors, like location, affect conference registration, or which members are most likely to renew or not. (**Associations Now**)

Sample RFP: Massachusetts Technology Collaborative

Request for Proposals for Consultant Support for Artificial Intelligence Taskforce

The John Adams Innovation Institute (”Innovation Institute”), a division of the Massachusetts Technology Collaborative, is issuing this Request for Proposals (RFP No. 2021-JAII-03) (the “RFP” or “RFP”) to solicit responses from qualified consultants (“Respondents”) with demonstrated knowledge and experience in the development of strategic planning documents focused on improving the competitiveness of individual industry sectors within tech and innovation economies.

This engagement focuses specifically upon the development of a Strategic Plan for the Artificial Intelligence sector in Massachusetts.

Respondents will be competing against each other for selection to provide the services set forth herein (the “Services”). The submissions of all Respondents shall be compared and evaluated pursuant to the evaluation criteria set forth in this RFP, and a single Respondent may be selected.

Full details included in the RFP below.

- Download RFP No. 2021-JAII-03 (PDF)
- Budget Template (Excel)
- Questions & Answers Document (PDF)

Supplemental Resource:

Arsenault, B. (2018). What does an AI RFP need to contain? Medium. https://towardsdatascience.com/what-does-an-ai-rfp-need-to-contain-13c747b316ed

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Impact of AI

Perceived Opportunities:
Personalized/customized, targeting, generate effective content, clear and consistent messaging, agile, identifying trends, campaign automation, timely, relevant, chatbot, outlines, drafting, brainstorming, staff productivity, translation.

Perceived Threats:
Staff reduction, reshape department, content could lose its edge, impersonal - based on analytics and not “feel”, deep fakes, overreaching/annoying.

Perceived Opportunities:
Better articles, automation, productivity, content repurposing, drafting, editing, ideation, creativity, customized engagement, planning, curated content, personalization, translation, tech. writing.

Perceived Threats:
Integrity/validation (not research-based), AI replaces publications/subscriptions, plagiarism, copyright and intellectual property, misinformation/disinformation, quality control, access and equity, human oversight policies.

Perceived Opportunities:
Planning/development of curriculum, content, and materials; synthesize/create summaries, needs-influenced programming, discover improved resources, productivity, engagement, monitor educational status and needs, leverage training, targeted suggestions, faster research, adaptive learning, learning plan, translation, upskilling.

Perceived Threats:
Competition, decreased revenue, ethics, cheating, fake information, bias, less innovation, devalued credential, falsified credits, quality.