



Ghost in the Spreadsheet

Innovation & Efficiency with
Generative AI in Finance &
Administration



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Agenda

1. What is Generative AI?
2. Rapid Adoption of Gen AI
3. Demo
4. Use Case: AI Search & Chat
5. Use Case: AI in Process Improvement & Process Documentation
6. AI Networks, Training, and Resources
7. Final Do's & Don'ts

What is Generative AI?

Definition ([Harris County Gen AI Guidelines](#)):

- GenAI models are trained on extremely large datasets to generate new content, such as text, emails, presentations, images, video, audio, architectural documents, diagrams, and other media.
- GenAI simulates human intelligence based on relationships amongst data and probabilities but isn't actual human-level intelligence.
- GenAI applications generate new content in response to prompts.



Rapid Adoption of Generative AI

- 39% of US population using gen AI
- 24% of US workers using gen AI
- 11% of US workers using gen AI *daily*

The Rapid Adoption of Generative AI*

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September 18, 2024

Abstract

Generative Artificial Intelligence (AI) is a potentially important new technology, but its impact on the economy depends on the speed and intensity of adoption. This paper reports results from the first nationally representative U.S. survey of generative AI adoption at work and at home. In August 2024, 39 percent of the U.S. population age 18-64 used generative AI. More than 24 percent of workers used it at least once in the week prior to being surveyed, and nearly one in nine used it every workday. Historical data on usage and mass-market product launches suggest that U.S. adoption of generative AI has been faster than adoption of the personal computer and the internet. Generative AI is a general purpose technology, in the sense that it is used in a wide range of occupations and job tasks at work and at home.

JEL Codes: J24, O33

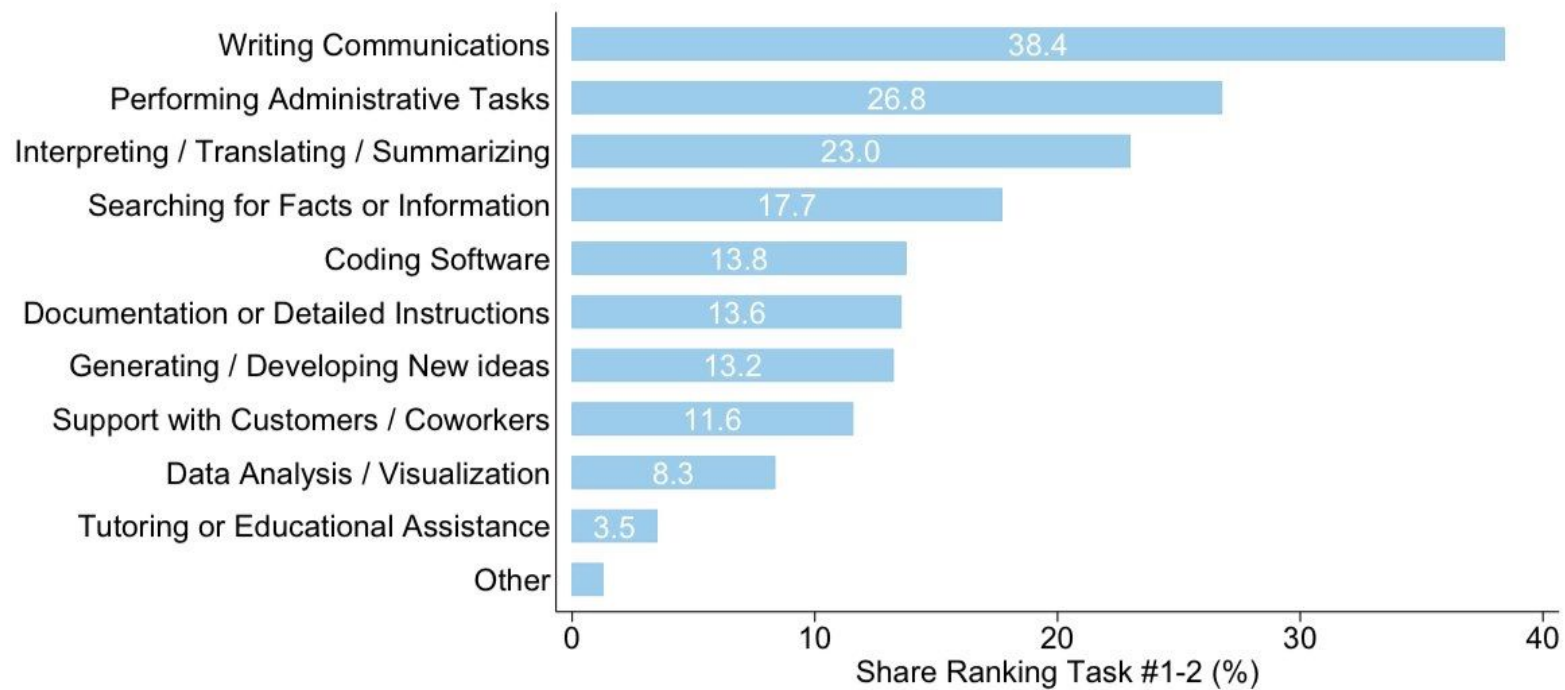
Keywords: Generative AI, Technology Adoption, Employment



In Which Specific Tasks in AI Most Useful?

Figure 6: In Which Specific Tasks Is AI Most Useful?

(a) At Work



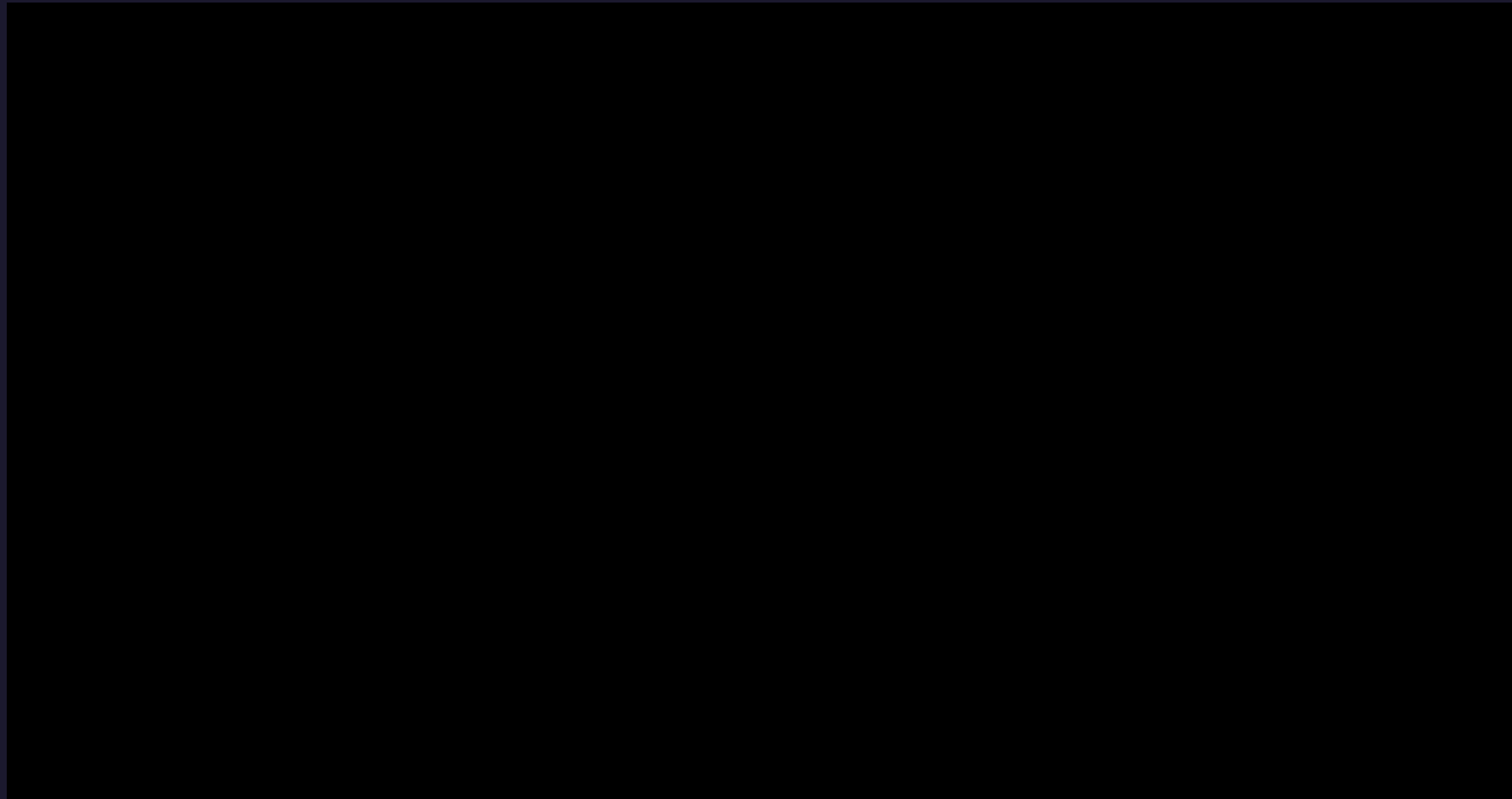


DEMO

Live demonstration of generative AI use cases in local government finance:


- ChatGPT
 - Claude, Gemini, Julius, Perplexity, etc.
 - [*Ghost in the Spreadsheet Podcast*](#) (NotebookLM)
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Use Case: AI Powered Search & Chat Tool



Use Case: AI in Process Improvement & Process Documentation

- AI-driven process documentation tool developed by national experts in government process improvement and civic technology.
- Voice AI interviews staff through quick phone calls.
- AI tool uses information from interviews to generate process documents, evaluate process for inefficiencies, and generate process maps.



For Official Use Only

RCA Process Check List

Revision Date: September 17, 2024 Procedure Number: RCAs in Unifier Checklist
Revision Number: 1.0

1: Receiving and Initial Processing

- Court Coordinator receives RCA in DocuSign.
- Court Coordinator reviews RCA for completeness and accuracy before saving.
- Court Coordinator requests additional information if supporting documents are incomplete.
- Court Coordinator labels the folder with CIC, consultant name, project ID, and precinct.
- Court Coordinator saves the PDF and DocuSign request in the folder in OneDrive.

2: Document Preparation and Review

- Court Coordinator transfers information from draft RCA to formal RCA inside OneDrive.
- Executive director reviews and initials the folder in OneDrive.
- Court Coordinator receives notification that the item is ready for submission.

3: Submission and Approval Process

- Court Coordinator submits the RCA to Commissioners Court via Legistar.
- Court Coordinator uploads RCA and supporting documentation in Legistar.
- Court Coordinator waits for the RCA to be placed on the agenda.
- County clerk posts the document on the website after approval.

4: Post-Approval and Documentation

- If not approved, Court Coordinator completes all activities to log that RCA was processed, but the document will have a stamp showing denied.
- If approved, Court Coordinator pulls the document from the county clerk's website.
- Court Coordinator saves the document into the 'approved agenda items' folder.

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RCA Process Check List

RCAs in Unifier Checklist

Use Case: AI in Process Improvement & Process Documentation

Pay Application Invoices for Construction - 08/06/2024 11:28
OPS V2 - Reprocess



Use Case: AI in Process Improvement & Process Documentation



Networks & Resources

Local Government Generative AI Resources	Resources & Policy	Community or Network	Training or Use Case Demos
<p>Government AI Coalition Facilitated by City of San Jose</p>	Yes	Yes	Yes
<p>AI Budget Explorers by Andrew Kleine—<i>message Andrew on LinkedIn to join</i></p>		Yes	Yes
<p>City AI Connect by John Hopkins University & Bloomberg Philanthropies</p>	Yes	Yes	
<p>Generative AI for Local Government Training and AI in Local Government Network (AILGN) by Micah Gaudet</p>		Yes	Yes

Other Training Resources

Education Title	Cost	Website
NACo AI Leadership Academy	\$595	NACo Artificial Intelligence (AI) Leadership Academy National Association of Counties
AI for Government	800-1000 \$CAD	AI for Government - Public Sector Network
AI Fundamentals for Public Servants	Free	AI Fundamentals for Public Servants: Opportunities, Risks and Strategies (apolitical.co)
Enhance public sector services with generative AI	Free	Enhance public sector services with generative AI - Training Microsoft Learn
GenAI in the Workplace	Free	Generative AI: Workforce Policy and Training Package (thinkific.com)
Using GenAI at Work for Public Sector	Free	innovate-us.org/workshop-series/artificial-intelligence-for-the-public-sector
Scaling AI for Public Sector	Free	innovate-us.org/course/responsible-ai-for-public-professionals-scaling-ai-in-your-organization
ChatGPT Mastery Local Govt	Free	ChatGPT Mastery for Local Governments
AI & Public Procurement	Free	AI & Public Procurement
AI Readiness, Classification, Risk Management	Free/\$\$ TBD	https://www.aiprocurementlab.org/aiprocurementprograms
Government AI Campus	Free	The Government AI Campus: A trusted global hub for AI excellence in government (apolitical.co)

Final Do's and Don'ts

- **Do try easy tasks first (i.e., drafts, brainstorming, editing, summarizing).**

vs trying to automate complex financial analyses or your ERP workflows...

- **Don't forget to review and QA the outputs.**

think of GenAI as a fantastic and speedy Master's or PhD intern...

- **Don't forget there is risk if you don't educate yourself.**

anyone can use GenAI even if you don't procure it or if you block it on your servers.

- **Do get started today.**





Thank you

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