

# Delegating to an AI Assistant

Finding Tasks to Test



# Purpose

- Find accessible opportunities to explore delegating tasks to Generative AI assistants
- Consider the relevant requirements for responsible AI use
- Run an experiment using these best practices to develop personal knowledge on AI's capabilities to help you.

# Background

Everyone brings **different skills, knowledge, and responsibilities** to their work, so the use cases that feel “game-changing” differ for each person. *What works well enough for one case will not for another.* One key skill in this stage of democratization of AI technology is identifying personal use cases that make a big difference in energy, time, and capability expansion.

One approach to identifying an opportunity to delegate work to AI successfully starts with a use case reported by others. This then requires a creative step: getting a sense of the reported case, identifying if there is anything you do that is similar, and turning that into an idea or a hypothesis of a delegation. The third step is testing whether the AI tool can safely help with the task and free up capacity for the human aspects of your work.

# Step 1: Generating Ideas to Test

These example tasks, although valuable and sometimes rewarding, can consume time and hinder a team's unique contribution. They are tasks a team might delegate to a competent assistant for a first draft. Here, they're grouped by stages of the research process.



## 1. Prepare

Print out the document, make a copy to edit, or grab a notepad.



## 2. Visualize

In each row, review the research task and nonprofit/B Corp analog. If you're familiar with that task, it may help to imagine the work and what, where, or when it involves "heavy lifting." The goal is just to remember what that task involves.



## 3. Connect

Does a repetitive or time-consuming part of the research or the nonprofit / B Corp task remind you of anything in your work? Most of these aren't similar to any one person's work. This step is not a science. It's more like quick idea generation or brainstorming. It's putting something into your context, which AI can't do.



## 4. Jot

If this is a work task you're responsible for, note it in the empty column to see if it's a workflow AI can assist with.

# Research: Discovery

| Task                                  | Social Impact Sector Example  | What do you do that's like this? |
|---------------------------------------|---|----------------------------------|
| Find and review related literature    | Scan for best practices and funder priorities   |                                  |
| Identify related content and papers   | Identify adjacent case studies, RFPs, model programs, or potential funders & partners |                                  |
| Simplify texts                        | Translate policies, grant drafts, and forms into plain language                       |                                  |
| Decipher complex docs/datasets        | Extract requirements and deadlines from RFPs & regulations                            |                                  |
| Bridge disparate academic disciplines | Bridge popular methods from one sector to another                                     |                                  |

# Research: Hypothesize

| Task   | Social Impact Sector Example  | <b>What do you do that's like this?</b> |
|--|---|---|
| Generate hypotheses at an accelerated rate                                 | Generate proposals for program tweaks to lift enrollment and engagement |   |
| Reveal gaps & overlooked hypotheses  | Reveal underserved segments & opportunities                             |   |
| Triage viability of ideas, allowing for "shotgun" multi-hypothesis testing | Triage pilot ideas before field tests                                   |   |
| Model theoretical approaches   | Model scenario cost/impact trade-offs                                   |   |

# Research: Analyze

| Task                                | Social Impact Sector Example                                | What do you do that's like this? |
|-------------------------------------|---|----------------------------------|
| Collect data                        | Collect and ingest public data and exported logs            |                                  |
| Mine data for correlations          | Surface patterns in donations or intakes                    |                                  |
| Analyze & process rapidly           | Compute stats for outcomes by site or segment               |                                  |
| Detect new patterns                 | Detect early-warning signals for demand or dropout          |                                  |
| Interpret beyond human capacity     | Interpret many joined data sources to reveal inclusion gaps |                                  |
| Synthesize data to test new methods | Test out the statistical sensitivity of impact models       |                                  |

# Research: Write & Present

| Task                                      | Social Impact Sector Example   | What do you do that's like this? |
|---|--|----------------------------------|
| Provide feedback on writing clarity       | Tighten grant narratives & check readability   |                                  |
| Prep citations & bibliography             | Prep complete references in evaluation reports   |                                  |
| Preprocess to accelerate peer-review step | Compliance sweep for required disclosures or citations & run a tough-review simulation |                                  |
| Detect citation issues                    | Flag dubious or dated sources  |                                  |
| Visualize data                            | Visualize executive "bird's-eye" overviews & equity breakouts for boards               |                                  |



# Pick Three for the Next Step

Review your ideas that are similar to your workflows. *Which would be most valuable to get occasional help with? Is there anything significant for your team these days? Anything, especially time or energy draining? Anything a first draft would do most of the work?* Try to star three options for the next step.

Seeing these opportunities may be an act of applied creativity supported by experimentation. But acquiring that experience involves **safe use of AI tools and an understanding of where to maintain oversight.**

# Step 2: Human Oversight Checklist



The next goal is to learn about the primary levels of risk in using AI in a workflow and the safeguards at each risk level, and then practice evaluating a potential application using your list from the previous step.



Today we'll only be doing experimentation, which the EU AI Act considers minimal risk. But if an experiment has a positive outcome, what then? Knowing the risk levels and their safeguards can help inform the risk/reward decision on whether it's a good idea to move forward to more regular workflow augmentation.



While today's new crop of advanced tools does augment work for missions, we humans must set purpose, boundaries, and verification requirements. As AI becomes democratized, everyone using it needs a basic idea of safe, responsible, ethical AI use.

# AI Workflow Safeguards: Least Risk

| AI Application Impact Level | Looks Like:   | Safeguard Checklist  |
|-----------------------------|---|--|
| <b>Personal exploration</b> | <i>learning/experimenting; summaries, simplifications, idea sketches.</i> | <ul style="list-style-type: none"><li>❑ Use non-sensitive, permission-safe data inputs.</li><li>❑ Be clear on your intent (e.g., articulate a one-liner in your head or at the top of the draft).</li><li>❑ <b>Challenge &amp; verify assumptions of AI outputs</b> before acting or sharing.</li><li>❑ Ensure there is a <b>human owner</b> responsible for any decision influenced by AI.</li><li>❑ <b>Transparency:</b> if sharing beyond your immediate working group, note that AI assisted the draft/analysis. It's even more transparent to note how/where it assisted.</li></ul> |

# AI Workflow Safeguards: Minimal Risk

| AI Application Impact Level                   | Looks Like:   | Safeguard Checklist   |
|---|---|---|
| <b>Personal ad-hoc, shared</b> (limited risk) | <i>drafts/charts you share with colleagues, but nothing is decided yet.</i> | <p><b>All the above +</b></p> <ul style="list-style-type: none"><li>❑ Tiny header in the doc/message (goal, key sources, reviewer).</li><li>❑ Reviewer check before sharing outside your working group.</li><li>❑ Light provenance in the deliverable (key prompt/snippet + sources).</li></ul> |

# AI Workflow Safeguards: High Impact

| AI Application Impact Level  | Looks Like:  | Safeguard Checklist  |
|--|--|--|
| <p><b>Team pilot or decision-influencing</b> (human-bounded)</p> <p>will change a resource allocation, public statement, eligibility, or external deadline</p> | <p><i>a time-boxed try-out whose results may shape choices (outreach variants, trial dashboards, "shotgun" hypothesis triage).</i></p> | <p><b>All the above +</b></p> <ul style="list-style-type: none"><li>❑ Map stakeholders and potential impact.</li><li>❑ <b>Ethical use checklist</b> (consent, measures, data handling, rollback).</li><li>❑ Monitoring plan with stop/escape rule.</li><li>❑ Subgroup check + an independent source for consequential claims.</li><li>❑ <b>Decision note</b> (what we will / won't change based on results).</li></ul> |

# AI Workflow Safeguards: Acceptable High-Impact

| AI Application Impact Level   | Looks Like:  | Safeguard Checklist  |
|---|--|--|
| <p><b>Operational/official use</b></p> <p>will change a resource allocation, public statement, eligibility, or external deadline <b>routine and relied upon</b></p> | <p><i>deployed workflows; affects eligibility, prioritization, benefits, compliance, or public statements.</i></p> | <p><b>All the above +</b></p> <ul style="list-style-type: none"><li>❑ <b>Formal policies, roles, and training</b> (human decision authority explicit).</li><li>❑ <b>Impact/risk assessment</b> (e.g., equity review / DPIA-style).</li><li>❑ Robust monitoring and incident response.</li><li>❑ Full provenance and audit trail (prompts, versions, sources).</li><li>❑ External <b>transparency</b> appropriate to the context.</li></ul> |

# Quick Self-Inventory

- Look back at the tasks in “Do you ever do anything like this?” that you starred. For each, estimate its impact level to estimate the oversight needed.

| #  | Task | Impact level |
|----|------|--------------|
| 1. |      |              |
| 2. |      |              |
| 3. |      |              |

# Step 3: Try one low-impact micro-pilot

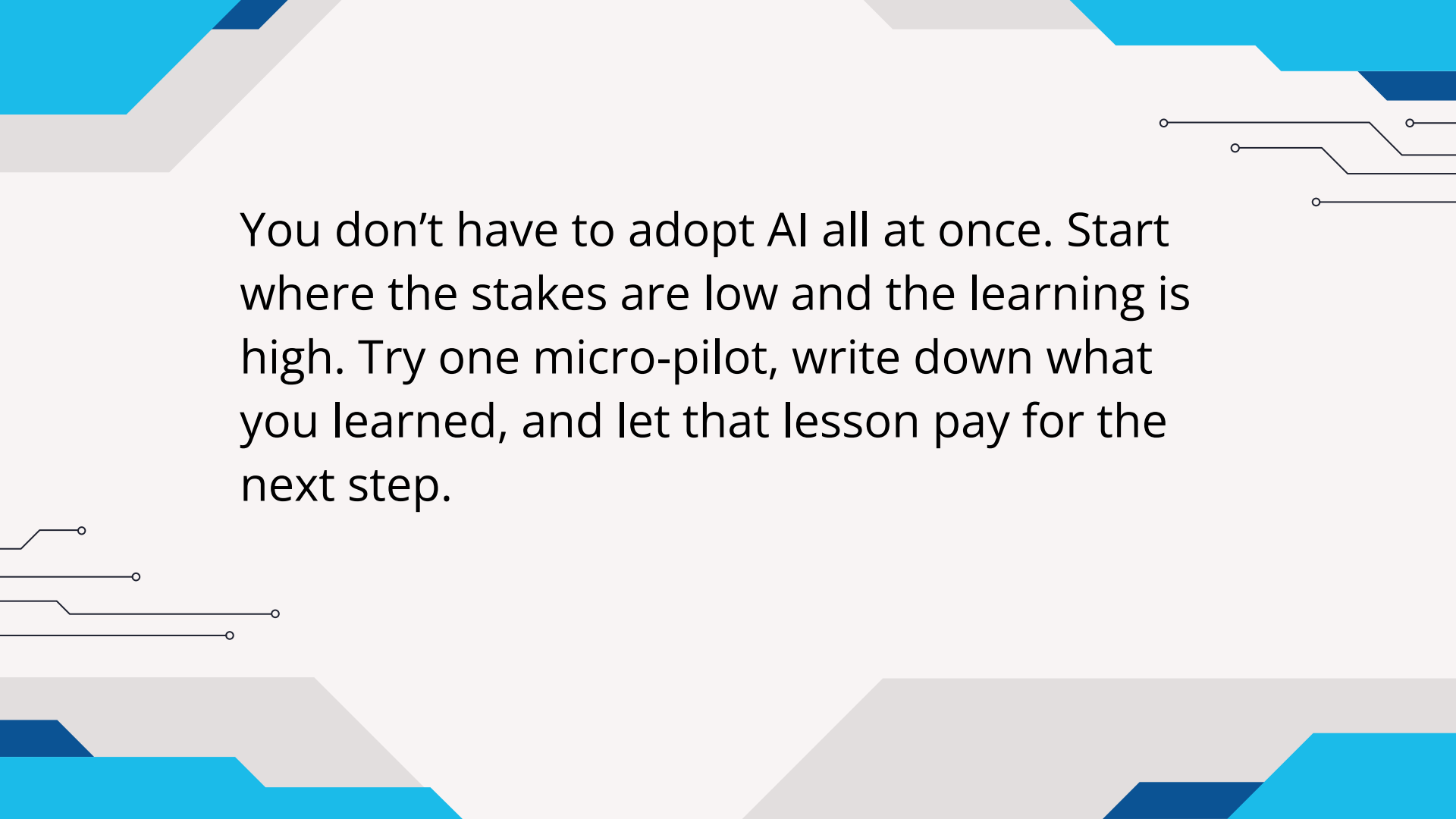
Pick one task you marked from the lower risk profiles of *personal exploration* or *personal ad-hoc (shared)*. Run the following micro-pilot.

|   |  |
|---|--|
| 1. One-line intent (goal + audience)  | Write it at the top of your draft.                             |
| 2. Data check   | Only public/permission-safe inputs                             |
| 3. Run it   | 30–40 min of focused work                                      |
| 4. Verify   | Quick second-source or sample spot-check before you act/share. |
| 5. Share with a reviewer (if outside your working group)                              | Add a tiny header: goal, key sources, reviewer                 |
| 6. Capture three bullets of learning  | Keep/kill/fine-tune decision; note time saved and any issues.  |
| 7. (If shared outside your working group) Add a one-line disclosure that AI assisted. | e.g., “AI-assisted drafting/analysis; human-reviewed.”         |



# Step 4: Reflect

- What surprised you (good or bad)?
- Where did AI help, and where did it hurt quality or clarity?
- Roughly how much time did you reclaim? What rework did you avoid?
- Any accuracy, bias, or privacy issues observed? What will you change next time?
- Reviewing the list of tasks from part 1, do any new ideas for experiments show up?



You don't have to adopt AI all at once. Start where the stakes are low and the learning is high. Try one micro-pilot, write down what you learned, and let that lesson pay for the next step.



# Thanks!

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