Using Artificial Intelligence in Service Delivery

A Framework to Evaluate Organizational Readiness

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connecting resettlement experts

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Introduction

Artificial Intelligence in Resettlement

As artificial intelligence (AI) reshapes work, including in the social services, refugee resettlement organizations face a critical question: How can we harness AI's potential while maintaining our commitment to ethical, human-centered support? The answer lies not in whether to use AI, but in how to implement it responsibly and effectively.[i]

> Artificial intelligence (AI) refers to any engineered or machine-based system that creates content, makes predictions, and generates decisions based on defined objectives. AI is not a specific technology but a broad classification encompassing various tools and capabilities that mirror aspects of human intelligence. AI is influenced by the humans and data training it.
>
> Tip: Look for blue boxes defining essential AI terms and concepts throughout this document.

Resettlement providers juggle an overwhelming array of daily tasks—from documenting cases in multiple languages and matching clients with limited housing options to analyzing years of program data and coordinating time-sensitive services. Artificial intelligence (AI) tools can help streamline these tasks. In the resettlement sector, AI has many **use cases**, which are specific scenarios describing how a user interacts with a system to achieve a particular goal. Examples include the following:

- Instant multilingual communication through translation
- Automated housing matching based on client needs
- Arrival pattern prediction and resource planning
- Program performance tracking and generating outcome possibilities for human consideration
- Integration of AI functions into existing case management systems for efficiency
- Enhanced knowledge sharing across teams
- Personalized client service planning and tracking

Using AI in refugee resettlement accentuates the critical balance between technological advancements and the ethical obligation to ensure fair treatment for vulnerable populations. AI must be implemented carefully and with human oversight.[ii] Service providers must ensure AI processes they use meet rigorous standards for consistency, reliability, and harm prevention.

That being said, AI should not be overlooked as a tool that can be used to foster innovation. Used correctly, it can increase efficiency and improve services without causing long-term harm to organizations, providers, or newcomers.

About This Framework

This evaluation framework outlines important considerations when using AI for resettlement services, allowing you to assess your organization's readiness to integrate AI into service delivery. Ideally, your organization should develop a comprehensive approach to using AI that includes alignment with humanitarian and data protection principles. (For case studies of these data protection principles in the humanitarian context, check out International Review of the Red Cross: Harnessing the potential of artificial intelligence for humanitarian action: Opportunities and risks, UN Global Pulse, and International Human Rights Law.) But if you are just beginning to consider AI, this tool provides practical tips to help you get started.

After presenting the framework, this resource introduces three personas who are navigating the use of AI in newcomer service delivery from their specific vantage points. Maria provides direct services to newcomers using innovative approaches; Ahmed is a passionate volunteer at a local ethnic community-based organization (ECBO); and Sarah is an executive director of a resettlement organization. Learn more about how these three personas implement the framework later in this resource.

Maria: Service Provider

Ahmed: ECBO Volunteer

Sarah: Strategic Leader

This framework is not intended to help users assess individual AI tools or models. Switchboard does not endorse any individual product or for-profit corporation.

Responsible Use of AI

Establishing Organizational Procedures for AI Readiness

Implementing AI technologies requires a structured approach beginning with leadership buy-in. Organizations can identify examples of successful AI adoption to present to leadership, define clear implementation roles, and conduct a thorough cost-benefit analysis. Technical readiness assessment is crucial—evaluate existing infrastructure and data storage systems, and identify any necessary upgrades.

Equally important is establishing comprehensive data governance policies that include protocols for data handling and clear guidance on authorized AI applications. If relevant expertise does not exist internally, hire a subject matter expert (SME) for guidance. All staff should receive mandatory AI training—including new staff as they are onboarded over time—with dedicated IT support for technology vetting. These foundational elements create a framework that enables organizations to adopt AI solutions responsibly while protecting sensitive client information.

Be Aware of Limitations and Risks

While AI tools are powerful and have many applications, refugee service providers should be aware of their potential limitations and risks. AI is not a suitable tool for all situations. Planning carefully, including developing and adhering to organization-specific policies, will help providers harness AI's benefits while minimizing risks.

When selecting AI tools, vendors, and models, it's vital to consider data protection, security, and privacy. This involves taking actions such as:

- Weighing potential concerns against potential benefits of AI use
- Safeguarding personal and confidential data
- Understanding how the AI model is trained on user data
- Recognizing biases in large language model (LLM) datasets
- Implementing a human-led vetting process of all AI-generated content

Generative AI (GenAI)

A type of artificial intelligence that can create new content, like text, images, video, music, and code. It identifies patterns in large datasets and produces new content from those datasets. The generated content mimics human-generated content; however, GenAI lacks human consciousness or emotions.

Large Language Models (LLMs)

A subset of generative AI, large language models (LLMs) are computer programs designed to understand, process, and generate human-like text. Trained on massive amounts of text data, LLMs learn patterns and structures in language in order to predict word sequences. They can generate text in ways that often mimic human capabilities.

Following the steps below can help to ensure your agency follows a "do no harm" approach to AI.

Understand AI's Limitations

Recognize that **machine learning models**—which use patterns and inference to improve performance over time—may not always provide accurate or unbiased information. **AI algorithms** are often trained on datasets that may not accurately represent the diverse demographics of clients in service provider settings. AI development is concentrated in wealthy, technologically advanced nations, so there is a lack of representation of the Global South, potentially widening the global digital divide. Due to these potential inaccuracies and biases, it's crucial to verify critical information and use your best judgment when deciding whether to use AI in your work.

AI Algorithms

A set of rules or instructions designed to enable a computer system to perform tasks that typically require human intelligence.

Machine Learning Models

A subset of artificial intelligence that uses data and algorithms to mimic the way humans learn, specifically through patterns and inference, to improve their accuracy over time without explicit programming.

Parameters

Settings or values that control how something works. In the context of AI, specifically in machine learning models, parameters are the values that the model learns from data during the training process. These parameters are adjusted to optimize the model's performance in making predictions or decisions.

AI **hallucination** is a key area of limitation. This occurs when an AI system generates outputs that are incorrect or nonsensical, often presenting them as factual. These hallucinations can happen for various reasons, such as ambiguous prompts, insufficient training data, or inherent biases in the data.[iii] To mitigate this, identify leaders such as IT or monitoring and evaluation (M&E) staff to review and maintain reliable data to train the AI model so that it generates accurate outcomes. Steps for training the AI model include collecting data from reputable sources, removing errors, and regularly updating data to maintain accuracy. Continuous monitoring and validation help keep the data relevant and trustworthy.

Put a Human in the Loop

Robust oversight mechanisms are needed to maintain accountability and protect clients from potential harm from inaccurate algorithms. This oversight should generally involve a "**human in the loop**": a person who will vet and verify AI-generated content, particularly when the information is used for decision-making, source citation, or programming.

Oversight mechanisms could also include certification processes for AI tools and frameworks designed to prioritize human rights and ethical standards, thereby fostering transparency and trust between service providers and clients.[iv] Examples of these frameworks and projects include NICCS and Microsoft AI for Good Lab.

Consult Experts

If in doubt, seek advice from colleagues working in IT or other relevant experts to make sure AI tools are properly implemented in your organization. Collaborate with subject matter experts (SMEs) on AI efforts to help your organization's initiatives be well-informed and carried out responsibly. Engaging a wide group of knowledgeable staff and partners can help develop effective protocols to minimize harm, ensure transparency, and reduce unfair practices against vulnerable population groups.[v]

Don't Overly Rely on AI

When using AI, especially for automating decision-making, a staff member familiar with the project should review the AI's recommendations. For example, AI can produce inaccurate information or poor outcomes due to inconsistent training data, difficulties in controlling data access and storage, and inadequate privacy measures. Over-relying on AI can diminish decision-making, critical thinking, and analytical skills. Invest in training programs to keep your staff aware of emerging trends and AI technologies, helping them maintain their expertise and adaptability. These training programs can also be provided by contracted subject matter experts.

Protect Confidentiality

Personally identifiable information (PII) must be removed or concealed. Processing PII—such as full names, addresses, Social Security numbers, or immigration numbers—in AI systems can expose client and organizational data to use in training the AI model, breaches of privacy, and data security risks. Paid AI services often provide greater transparency and data protection, but this requires confirmation with the AI vendor and thorough vetting.[vi]

Implement Cybersecurity Measures

AI platforms are vulnerable to cyberattacks and data breaches. Use proper privacy settings and disable unnecessary data sharing. Examples of this include collecting minimal data, obtaining informed consent, using strong encryption, and implementing strict access controls. Remove personal, client, and organizational data and confidential information before uploading data to AI systems. This step is a crucial measure because confidential information cannot be removed once it has been used to train an AI model.

Navigating AI in Refugee Resettlement: A Practical Framework

The framework below is a starting point for considering the use of AI technology in your service delivery. While AI offers promising solutions to enhance service models, its practical applications are rapidly evolving. Continued curiosity, consideration, and learning are required to keep up with its pace. Use this framework to identify the current stage of your program's or organization's readiness for integrating AI technology into service delivery.

Readiness Components

1. Organizational Readiness
2. Problem-Solution Alignment
3. Data Security and Privacy
4. Ethical Considerations
5. Resource Management

Directions

Answer the questions below. Add up your total checkmarks from each section and write them in the spaces below to determine which stage your program and/or organization falls into, and circle the scoring category image after each section.

Scoring

This scoring matrix can be an effective tool for evaluating your organization's readiness for integrating AI technology by providing a structured, objective way to assess multiple factors. By evaluating each criterion and calculating an overall score, decision-makers can prioritize AI adoption based on potential impact, feasibility, and alignment with your organization's strategic objectives. This will help ensure that resources are allocated wisely and the technology is implemented where it can provide the most value.

 **Nascent Stage:** Total score between 2 and 3 checkmarks per section.

Interest in using AI is just coming into existence, and individuals within your program and/or organization are using it without clear guidance.

 **Emerging:** Total score of 4+ checkmarks per section.

AI policies and comprehensive plans have become more prominent, and there is a strategy disseminated for implementation.

1. Organizational Readiness

✓ **Have you secured leadership buy-in?**

- ☐ Identified, gathered, and documented examples/case studies of successful AI adoption and implementation, both within my organization and at similar organizations. Prepared a presentation for leadership showcasing these examples.
- ☐ Confirmed leadership commitment to AI exploration.
- ☐ Defined roles and responsibilities for AI adoption and implementation with a detailed plan outlining each team member's duties and expectations.
- ☐ Performed a cost-benefit analysis of the initial and ongoing costs and benefits of using AI.

✓ **Does your organization have the technology infrastructure for using AI tools?**

- ☐ Assessed the necessary technology (hardware, software, Internet) currently available at my organization, and planned to acquire any needed technology where gaps exist.
- ☐ Checked and evaluated if our data storage and management systems can handle and work with AI. Identified any limitations or gaps in current systems and created a budget plan to enhance storage capacity and upgrade management systems.
- ☐ Measured staff capacity and assessed AI training needs and resources; created working groups to address gaps in resources and increase staff capacity if needed.
- ☐ Assessed capacity for ongoing maintenance of the system. This includes potentially identifying and assigning a dedicated subject matter expert (SME) to understand the limitations of AI, respond to concerns, troubleshoot issues, and stay up to date with developments in the programming/field of AI.

✓ **Have you established a data governance policy?**

- ☐ Established or updated policies for data collection, storage, and use after reviewing existing resources and assessing gaps. Communicated changes to all staff.
- ☐ Established guidance on how to use and not use AI technology (a comprehensive list of authorized and unauthorized AI projects/apps) and distributed it across the organization.
- ☐ Ensured all staff, including new hires, are trained on AI use and policies in standard onboarding.
- ☐ Obtained IT support for vetting new AI technology.

Total: ____  

2. Problem-Solution Alignment

✓ **Will the adoption of AI address the needs of your organization?**

- ☐ Determined if AI will help the organization achieve goals (e.g., efficiency, data security, case management).
- ☐ Assessed potential efficiency gains and unintended consequences of using AI after conducting a thorough analysis to identify potential efficiency improvements and risks.
- ☐ Prepared a report summarizing findings and recommendations for leadership review.
- ☐ Defined "use cases"—the specific scenarios and purposes for which AI would be used (e.g., job matching and skill development, optimizing logistical processes, and personalized client service planning and tracking).

✓ **Have you tested the AI tools and gathered feedback on their feasibility?**

- ☐ Identified a relevant testing group (e.g., a subset of volunteers or multilingual staff) to test each AI tool (e.g., a speech-to-text AI app).
- ☐ Provided group participants with an overview of the AI tool and its goals as they were testing it so they could provide helpful feedback.
- ☐ Evaluated the technical feasibility of each AI tool (i.e., a use case showing how the tool helps in real-life scenarios) with each testing group.

✓ **Do the AI tools provide efficiency benefits to workload?**

- ☐ Prioritized using AI tools that have high impact and are relatively easy to implement by evaluating and ranking AI tools based on their potential impact and ease of implementation.
- ☐ Engaged with direct service staff during the planning stages to incorporate their insights and experiences into the planning and decision-making process.
- ☐ Considered non-AI alternatives for each problem to determine cost-benefit of AI adoption, and documented findings.

Total: ____  

3. Data Security and Privacy

✓ **Have you set up systems for mitigating risk?**

- ☐ Established strategies for minimizing the risks of using AI (e.g., encryption, anonymization, restricted access).
- ☐ Communicated legal requirements, rules, and regulations related to AI for staff.

✓ **Have you identified ways to secure clients' data?**

- ☐ Established strategies for protecting sensitive data (e.g., PII, health information, immigration status).
- ☐ Complied with relevant laws and ethical guidelines (e.g., GDPR, HIPAA).

✓ **Have you planned for human oversight of the AI use?**

- ☐ Established a "human in the loop" approach to vetting and verifying AI-generated content to ensure fairness and accurate outcomes.
- ☐ Developed policies and practices to avoid an ongoing over-reliance on AI to complete a job without human oversight, which could lead to generic or inappropriate results.

Total: ____  

4. Ethical Considerations

✓ **Have you considered ethics and fairness?**

- ☐ Developed and implemented a standardized assessment checklist that evaluates each AI tool for potential inaccurate outcomes or misuse of data (including testing the tools to evaluate the outputs and reading about safety issues published online). Made adjustments as needed to mitigate negative impacts.
- ☐ Ensured fairness in service delivery by incorporating AI to identify needs and recipients, while actively including client feedback and staff insights in decision-making processes.
- ☐ Addressed digital literacy needs of both clients and staff by providing comprehensive training when integrating AI tools into service delivery.

✓ **Have you established a process to educate and train staff on AI policies?**

- ☐ Developed process to maintain transparency in decision-making related to staff use of AI, ensuring all processes are clear and understandable.
- ☐ Trained staff to recognize the risks associated with using AI in decision-making, particularly the potential for misalignment with humanitarian principles.

✓ **Do you have a process for gathering informed consent?**

- ☐ Educated clients and staff on the potential risks associated with AI, particularly if using personal information, and that clients give consent when using AI technology in programming.[vii]
- ☐ Maintained transparency in AI usage within programming for clients, clearly communicating how AI is being utilized.

Total: ____  

5. Resource Management

✓ **Is there budget allocation for AI tools and use?**

- ☐ Identified funding streams (e.g., grants) for AI adoption (licenses, software, IT, etc.)
- ☐ Established a budget for AI investments (tools, training, infrastructure).

✓ **Have you planned for ongoing staff training on the use of AI?**

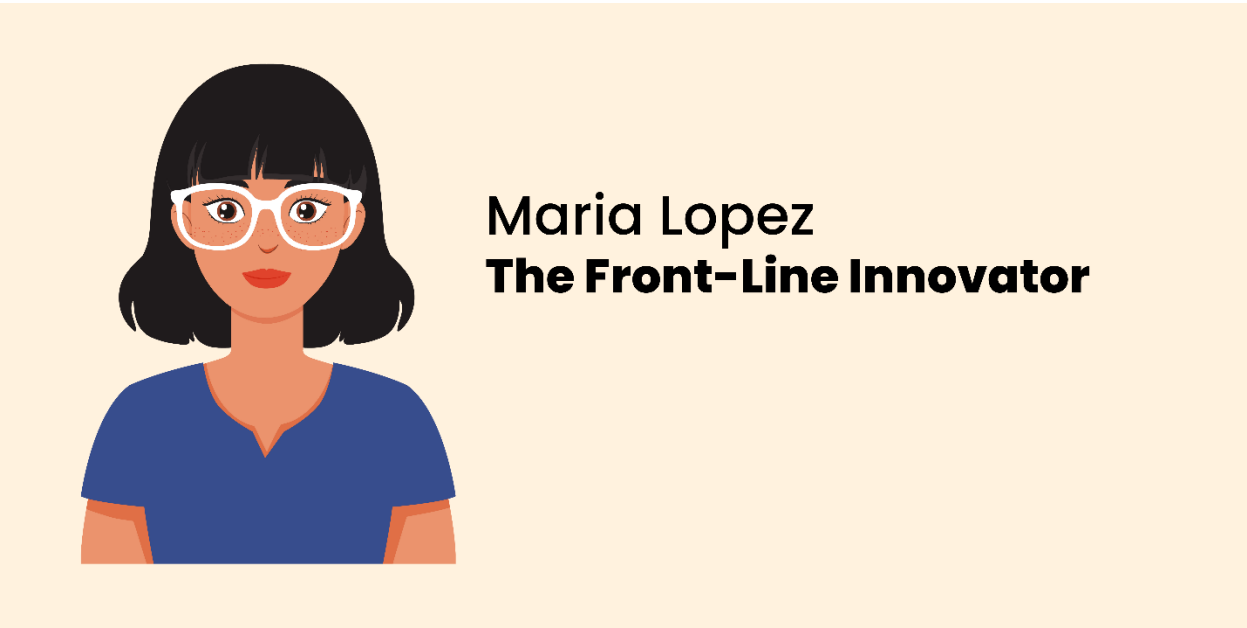
- ☐ Equipped staff with user-friendly guides and overviews for AI tools.
- ☐ Identified digital literacy training for client-facing programming.
- ☐ Established safe ways to enable curiosity about new applications and software (e.g., system for vetting new AI projects and apps for use, such as setting up a request form).
- ☐ Established ongoing support systems (IT, SMEs, communities of practice).

Total: ____  

Meet Our Implementation Scenario Personas

From Framework to Practice

To bridge the gap between theoretical frameworks and practical application, we'll now explore how this framework adapts to different perspectives and responsibilities through the experiences of three professionals—a direct service caseworker, an ECBO volunteer, and an executive director. We'll discover below how each of these professionals navigates AI implementation in their respective roles. Through their experiences, we'll see how the same framework adapts to different needs and responsibilities while maintaining core principles of ethical AI use in humanitarian work.



Maria Lopez: The Front-Line Innovator

As a resettlement caseworker, Maria brings a ground-level perspective to AI implementation. Her focus is on practical applications that can streamline client services while maintaining the "human touch" essential to resettlement work.

1. Organizational Readiness

Maria is passionate about leveraging technology to streamline newcomer services while maintaining a human-centered approach. She identifies practical applications of AI for identifying and connecting clients to new recertification programs, which can free up more of her time for personalized newcomer interactions.

To gain leadership buy-in, Maria prepares a detailed proposal highlighting the benefits of AI to

improve the program's recertification outcomes. She presents case studies from similar organizations that have successfully implemented similar AI tools, demonstrating improved efficiency and satisfaction. Maria requests resources for AI training and infrastructure upgrades. She also offers to help research and craft training materials with SMEs and leadership to make sure staff are well-equipped to use the new technology.

As Maria meets with her clients over the next few weeks, she informs them that her organization is incorporating new technology into their work. She explains how she uploaded another client's resume and their interests to an AI program that found new recertification programs for them to participate in. After explaining these benefits of the technology, Maria also shares the risks and limitations of using AI to the client. The major risks include using the applicant's personal information, including their full name, address, phone number, and work or educational information. Maria provides training for clients to learn how to create professional emails and phone numbers to avoid sharing sensitive information. She also provides a list of reputable job boards that offer privacy settings that allow users to control who can see their resume and limits the visibility of private information. Ultimately, the client decides they would like to participate and signs an informed consent form.

2: Problem-Solution Alignment

Maria identifies an AI program that can find new recertification programs for clients to participate in. Using this AI tool would create more time for Maria to address the unexpected needs of newcomers on her caseload. Maria seeks feedback from her team's direct service staff to assess if others share this perspective. She compiles the team's feedback into a proposal for a pilot program to test AI technology's tangible benefits over non-AI alternatives. Maria aims to showcase the practical advantages, ethically address potential concerns, and ultimately secure leadership's support for AI adoption in direct services.

3: Data Security and Privacy

Maria is aware that any use of AI technology requires a strategy to mitigate risks and protect data. She decides to collaborate with the IT team to help form this strategy. She learns to never use any personally identifiable information (PII) of staff, newcomers, or funders in AI applications. This involves encryption, anonymization, and restricted access to sensitive information. Encryption converts data into a coded format to prevent unauthorized access, while anonymization removes personal identifiers to protect privacy. Restricted access limits who can view or use sensitive information, ensuring it remains secure.

Maria ensures compliance with legal requirements, such as the General Data Protection Regulation (GDPR) and Health Insurance Portability and Accountability Act (HIPAA), by reading and distributing relevant policies to leadership for examples of privacy-preserving practices. Maria only uses AI tools that have been vetted for their robust security measures. By implementing these strategies, Maria effectively secures client data and maintains the organization's ethical standards.

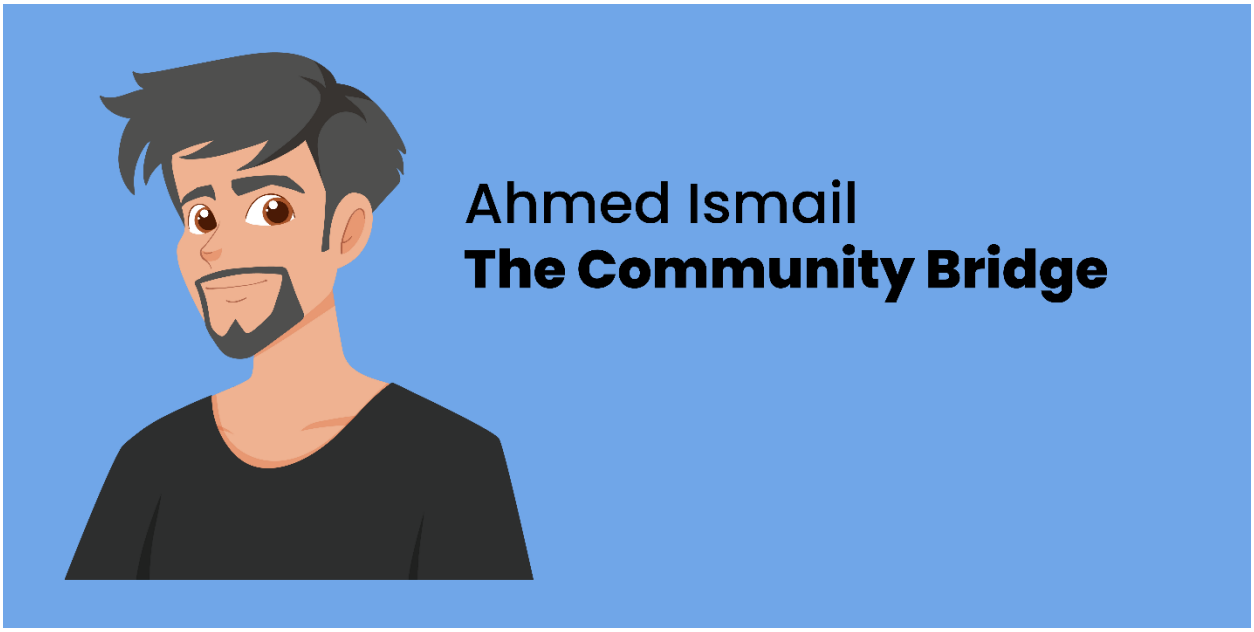
4: Ethical Considerations

Maria is dedicated to keeping ethical considerations at the forefront in using AI for direct services for newcomers. She begins by obtaining informed consent from clients, clearly explaining how AI will be used and the potential risks involved as they are participating in new recertification programs. Maria is aware that automated decision-making can sometimes misalign with humanitarian principles, so she researches the AI tool for potential biases and reaches out to subject matter experts and IT when she is uncertain. Maria confirms the AI tool aligns with her organization's values.

Maria works with leadership to implement plans for human oversight to ensure fairness and accuracy in AI outcomes. She also keeps in mind fairness in service delivery and access to technology so that all clients benefit equally from AI tools.

5: Resource Management

After gathering insights from using AI for identifying recertification programs, Maria organizes a community of practice (CoP) in her office to collectively produce user-friendly guides and overviews for additional AI tools for other programmatic needs, making it easier for the staff to effectively adopt and use these technologies. Maria includes an SME from a local university to support this CoP. Through discussion and resource sharing, the group curates a list of AI tools and best practices to share with the greater network. Recognizing the importance of digital literacy, Maria also identifies digital literacy training programs for clients to help in their recertification journeys.



Ahmed Ismail: The Community Bridge

Ahmed, a dedicated volunteer at an ethnic community-based organization (ECBO), is passionate about integrating AI into the organization's service delivery—in particular to help clients with disabilities access appropriate assistive technology. As a person with a visual impairment, Ahmed believes that AI has contributed to his personal success by assessing his needs and connecting him with a voice-controlled smartphone. He now wants to use what he has learned to give back to others in his community, making AI accessible while respecting cultural considerations and addressing potential barriers.

1: Organizational Readiness

After noticing challenges faced by clients with disabilities, Ahmed begins researching AI applications specifically designed to improve accessibility. He drafts a detailed proposal for an AI-powered assistive technology assessment system that would help match clients with appropriate devices based on their specific disabilities and needs. The proposal highlights how this AI system could efficiently evaluate client needs in multiple languages, recommend appropriate assistive technologies, and track outcomes to improve future recommendations.

Ahmed's proposal includes a cost-benefit analysis showing how the AI system could save staff time while improving client outcomes. He also addresses potential barriers, such as staff training requirements and the need for regular updates to the AI's device database. Ahmed engages with key stakeholders at the ECBO, including program managers and client service representatives who work directly with people with disabilities, gathering their input to refine the implementation plan.

2: Problem-Solution Alignment

During his volunteer visits, Ahmed frequently encounters clients with disabilities who lack appropriate assistive technology. For instance, clients with visual impairments need screen readers; those with hearing impairments need captioning tools; and clients with mobility issues need specialized input devices.

Ahmed proposes implementing an AI-powered needs assessment tool that uses natural language processing (NLP) to interview clients about their daily challenges. The tool analyzes responses to recommend specific assistive technologies tailored to each client's unique needs. During a demonstration to the volunteer supervisor, Ahmed shows how the AI-powered chatbot asks questions in the client's preferred language, processes their responses, and generates a personalized list of recommended assistive devices, along with where to find them and potential funding sources. This directly addresses the use case of helping clients with disabilities access appropriate technology, similar to how Ahmed was connected with a voice-controlled smartphone for his visual impairment.

Natural Language Processing (NLP)

A type of artificial intelligence that enables machines to understand, interpret, and generate human language

3: Data Security and Privacy

Ahmed has autonomy and flexibility to work with and get to know clients during his visits. He has seen the advantages of capacity building and would like to develop a mentoring program. He already provides coaching to newcomers and wants to enhance this with an additional focus on general app training for people with language challenges and disabilities.

Since Ahmed and other volunteers don't have authorization to access clients' personal information, he consults with his supervisor about appropriate data collection practices. Ahmed specifically asks:

- *What types of client data can be ethically collected to improve the app's personalization*
- *How to securely store this information within organizational compliance guidelines*
- *What consent procedures should be implemented before collecting any data*

The supervisor carefully reviews these questions and identifies potential privacy risks, such as:

- *Client disability information being accessed by unauthorized third parties*
- *Training data potentially revealing identifiable information about specific clients*
- *Personal devices storing sensitive information after app use*

To address these concerns, the supervisor recommends implementing "de-identified accounts" that don't contain personal identifiers when clients access the AI tools. Additionally, the supervisor provides Ahmed with a standardized consent form explaining what data will be collected, how it will be used, and clients' rights to delete their information. This approach ensures compliance with organizational regulations while still allowing the AI application to provide the personalized training that makes it effective for clients with diverse needs and abilities.

4: Ethical Considerations

While using the AI-powered needs assessment tool with clients, Ahmed notices discrepancies in its recommendations. The system consistently suggests more expensive assistive devices to certain ethnic groups while offering lower-cost alternatives to others, despite similar needs and circumstances. Additionally, the tool struggles to accurately recognize specific accents or dialects common among some newcomer communities.

Ahmed brings these inconsistencies to his supervisor's attention. Together, they examine how limitations in the training data for the AI system may be causing these uneven outcomes. They decide on several approaches to improve the system. First, Ahmed should document pattern discrepancies in recommendations to enhance the AI's training data. Second, they will implement human oversight of all AI recommendations before sharing them with clients. Third, they'll anonymize client data when training or fine-tuning the AI system. Finally, they'll create feedback mechanisms for clients to report inaccurate or inconsistent suggestions.

5: Resource Management

Ahmed would like to communicate information that promotes cultural exchange opportunities at the upcoming Spring Fling event at the park, and he wants to use community anchor institutions like the library to host engaging activities among the community. Ahmed uses AI-powered chatbots to send automated notifications and reminders. He also shows clients how to share messages with family and friends using AI-powered tools like text to speech.

Sarah Thomas: The Strategic Leader

As Executive Director of Hope Refugee Services, Sarah approaches AI implementation with a focus on organizational sustainability and scalable impact. Her primary concerns include ensuring proper infrastructure, improving the efficiency and effectiveness of her organization's service delivery, and maintaining ethical standards across all AI initiatives.

1: Organizational Readiness

Sarah, the executive director, is dedicated to implementing AI to enhance her organization's sustainability and achieve scalable impact. To secure commitment from the board of directors, she holds a meeting where she presents successful case studies from similar organizations and identifies a specific focus area that AI can support.

Next, Sarah works with her leadership team to audit the organization's current technology infrastructure and finds that firewalls are preventing the use of certain AI applications. She collaborates with the IT department to update the network settings for compatibility with AI tools.

Simultaneously, Sarah starts a working group to begin researching existing governance policies for data collection, storage, and use across the resettlement sector. She makes sure governance includes measures like creating guest accounts (temporary or long-term, anonymous online accounts to hide users' identity, used for testing new platforms without commitment or to prevent external organizations from collecting client/staff user data), restricting access to authorized personnel, and using aliases when sharing client information to maintain ethical standards. Through these efforts, Sarah prepares a report for the board on an ethical approach for the organization's AI adoption that will enhance the efficiency and effectiveness of service delivery.

2: Problem-Solution Alignment

Sarah is evaluating whether AI is the right technology to address her organization's challenges. She begins by aligning the potential AI adoption with her organization's goals, focusing on improving efficiency, data security, and case management.

Sarah conducts a thorough assessment of potential efficiency gains and unintended consequences of AI implementation. She identifies three AI use cases from the assessment, including translation services, chatbots for client interaction, and data management. To assess technical feasibility, she collaborates with IT and SMEs to evaluate these areas. Sarah works with a program manager to collect feedback and insights from direct service staff through a survey and focus groups during the planning stage to ensure practical applicability and address any concerns.

Sarah considers non-AI alternatives for each problem to determine whether AI is the most effective solution. She compares the efficiency benefits of AI tools against these alternatives to make an informed decision.

3: Data Security and Privacy

Sarah collaborates with her IT team to classify sensitive data, making sure that personal information, health records, and immigration statuses are properly identified and protected. She identifies an AI tool for data management as a use case and thoroughly reviews the tool's privacy policies to confirm that client data is not compromised. To minimize risks, Sarah works with IT to develop strategies such as encrypting sensitive data and using throwaway accounts to anonymize client data when training or fine-tuning the AI system. She also incorporates human oversight to maintain accuracy and accountability in AI initiatives. (This oversight can be performed by managers and can include monitoring AI outputs, reviewing decisions, and addressing any issues that arise.) Sarah works with IT and her management team to collect and develop training resources detailing privacy policies that instruct staff to remove all confidential information (of staff, clients, or funders) before uploading any data or documents to an AI system.

Through these efforts, Sarah makes sure her organization is ready for AI adoption, improving service delivery efficiency and effectiveness while upholding ethical standards.

4: Ethical Considerations

Sarah organizes a task force to educate and train staff on AI policies, emphasizing transparency and explainability of AI decisions. She consults with a wide group of colleagues about possible unintended consequences on refugees and newcomers. Sarah also researches existing paid AI tools used in humanitarian fields to ensure they align with the organization's ethical standards, as paid AI tools often provide users more privacy and ethical parameters than free tools.

At a macro level, Sarah considers AI's global environmental impact and sustainability, such as its energy use and water consumption. She co-hosts "brown bag" lunches with the staff to discuss ways to minimize their environmental impact. The group reads and discusses the MIT News report on Generative AI's Environmental Impact, which explores the consequences of generative AI, including

increased electricity demand and water consumption for cooling hardware. It also discusses efforts to reduce AI's carbon footprint. Through these efforts, Sarah creates dialogues and intentionality around using AI ethically, transparently, and sustainably, protecting the interests of refugees and other newcomers while maintaining the organization's integrity.

5: Resource Management

Sarah strategically allocates a portion of the organization's budget for AI investments, covering essential tools, training, and infrastructure upgrades. She conducts thorough research to identify potential funding streams, such as grants and donations, to support AI adoption and implementation. By securing these financial resources, Sarah makes sure the organization is well-equipped to effectively integrate AI technologies.

To facilitate smooth adoption, Sarah works with her leadership team to produce user-friendly guides and overviews of the AI tools for staff. She works with program staff to organize training sessions to familiarize employees with the new technologies, making it easier for them to adopt and use AI tools efficiently. Through these efforts, Sarah successfully manages resources to support AI implementation, enhancing the organization's service delivery and overall impact.

Key Takeaways

This framework is a foundational step toward developing a more comprehensive approach to AI within a particular program or organization as a whole. To better implement and leverage this technology in resettlement programming, organizations, providers, and the community must be aware of the challenges and ethical considerations. When using AI tools to enhance service models, it's important to invest in training to upskill and prepare everyone to navigate the changing technological landscape. Ongoing curiosity, thoughtful consideration, and continuous learning are essential to keep pace with this dynamic technology.

Resources

Switchboard's Emerging Technology team provides training and technical assistance (TTA) on the integration of emerging technologies into resettlement programming. If you are interested in learning more about using emerging technologies such as virtual reality in the resettlement process, submit a request here.

- Learn about using virtual reality in resettlement with 360 videos
- Visit Switchboard's YouTube channel for session recordings from a recent Emerging Technology in Resettlement event

Resources on Responsible AI Use

- AI Tool Request: example of an IT form where employees can submit a request to incorporate AI into their workflow
- Anthropic: researching the impact of AI on society
- Global Giving: organization providing guides on responsible AI use policies for nonprofits, detailing how to develop ethical frameworks and policies for AI usage
- Microsoft's Nonprofit Techies: resources that empower nonprofits with AI tools, such as a beginner's guide to teaching AI skills
- National Artificial Intelligence Advisory Committee: recommendations for enhancing AI literacy for the United States of America
- Stanford Social Innovation Review (SSIR): publication on how nonprofits can adopt AI responsibly, including practical steps and ethical considerations
- The Dos and Don'ts of AI in the Workplace: good practices for using AI in your workplace
- University of California Elevating AI Excellence: tools and resources for responsible AI use
- WIRED: How to Use Generative AI Tools While Still Protecting Your Privacy: information on how to protect your own personal information and that of clients

Resources on AI in Resettlement and Social Services

- AI for humanitarian action: Human rights and ethics (International Review of the Red Cross)
- AI in Refugee Resettlement Risks Discrimination (Global News AI)
- AI Use in Refugee Resettlements Raises Risks of Discrimination (Bloomberg Law)
- Artificial Intelligence in Social Work: Emerging Ethical Issues (International Journal of Social Work Values and Ethics)
- How AI Is Improving Outcomes for Resettled Refugees (University of Oxford Department of Economics)
- New Software Does the Hard Work in Placing Refugees (HIAS)
- The Guide to Usefulness of Existing AI Solutions in Nonprofit Organizations (NetHope)
- Using machine learning to help refugees succeed: How GeoMatch is revolutionizing resettlement efforts (Stanford Momentum)
- When AI Gets It Wrong: Addressing AI Hallucinations and Bias (MIT Management)

Examples of AI Platforms

- Dataro: example of an AI-powered fundraising intelligence platform that helps nonprofits predict donor behavior, target outreach, and generate personalized content
- Fundraise UP: example of an AI-powered fundraising tool that integrates with nonprofit customer relationship management (CRM) businesses to optimize giving

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