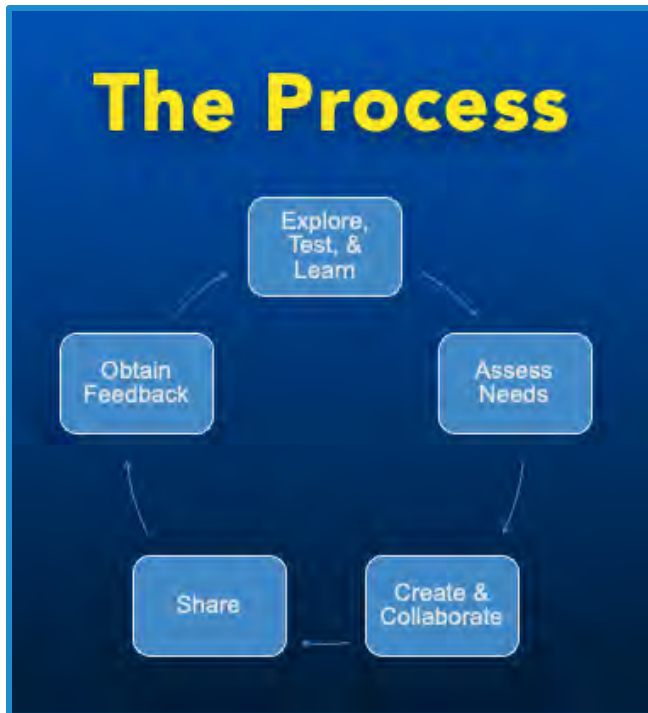


Generative AI Collaborative Group Final Report

July 2024

Submitted by:

- Shannon Boni, Admission Interview Coordinator and Data Specialist
- Vincent Carbone, Manager of Arts Center Operations
- Debbie Carpenter, Summer Programs Office Coordinator
- Carissa Casey (Co-Chair), Director of Institutional Research
- Heather Cordes, Director of Leadership and Annual Giving
- Maya Drye, Payroll and Human Resources Administrator
- Maria D'Urso, Financial Office Assistant Controller
- Megan Jackson, College Counseling Office Coordinator
- Todd Jaser (Co-Chair), Website & Electronic Communications Manager
- Geoff Lane, ITS Network Specialist
- Darryl Mayer, Community Safety Officer
- Grace McGee, Admission Senior Associate Director
- Jeffery Jones, ITS Systems Integration Specialist
- Angela Ruiz-Cutler, Facilities Office Administrator



The Generative AI Collaborative Group was charged to identify, create, and recommend foundational resources, guidelines, and/or policies specific to responsibly using Generative AI for the **business and administrative operations** of Choate Rosemary Hall. Using an iterative model that mirrors a prototype cycle, this team dedicated their time to explore, assess, create, and collaborate to provide the initial framework and guidelines to safely and responsibly use Generative AI within our community. From January 2024 to May 2024, this team individually and collectively learned about Generative AI through various professional

development opportunities (e.g. Dr. Andy Van Schaack, Lunch & Learn, ASK Conference, etc.). Through a survey and focus group from February 2024, this team obtained Staff’s perceptions on the benefits, concerns, and needs of using Generative AI. This provided the necessary directions to create the preliminary guidelines, resources, and tools found on the internal Gen AI Portal and the recommendations proposed in this report. Throughout this process, both the Gen AI Steering Committee and Gen AI Collaborative Group were informed of each team’s work to ensure consistency across all school adults. For additional details on the process and philosophy of these collective efforts, please refer to the April 2024 Generative AI Steering Committee Final Report.

Generative AI Collaborative Group Recommendations

Additional Recommendations from the Gen AI Collaborative Group based on Steering Committee’s April 2024 Final Report

1. Establish a Generative AI Policy Group

- a. Additional Recommendation from Collaborative Group:
 - i. As identified by the Gen AI Steering Committee, “a representative from the Gen AI Collaborative Group” should be included on the Gen AI Policy Group. Additional recommendation of identifying that representative as one of the Co-Chairs of the Gen AI Collaborative Group and MSA RAIL Leadership Team.

- ii. Include an IT representative who has been designated as an AI specialist who can provide technical context to the group.
 - iii. Designate individuals from the Gen AI Policy Group as a subcommittee to continuously keep the policy group aware and up-to-date with industry trends, tool updates, community needs, etc. and to monitor and update the internal Gen AI portal.
 - 1. Consider identifying the subcommittee members within the policy group through a modified version of [MSA RAIL's recommended AI Lead Roles](#). For example, representative from the Gen AI Collaborative Group and MSA RAIL team as AI Owner; Director of Studies as Instructional Leader; AI-focused IT representative as IT Leader.
 - 2. Recognizing the workload of the subcommittee, establish compensation options such as a stipend or adjusted responsibilities within primary role.
 - iv. Consider identifying and building internal measures to monitor progress of Gen AI. The policy group will need to determine how to define “progress” (e.g. usage, learning outcomes, attitudes towards Gen AI, performance, etc.) based on the different constituents (faculty, staff, or students). For students, consider building measures into surveys that exist such as the Adviser Day/Boarding Survey or Student Feedback Forms.
 - v. Establish a foundational professional development plan for the Gen AI Policy Group that focuses on the basics of Gen AI literacy, safety, and ethics by completing the applicable topics from the AI Literacy and Awareness Canvas courses.
- 2. Create a central location for all Generative AI policies, practices, and information to be published for Staff and Faculty**
- a. Additional Recommendation from Collaborative Group:
 - i. Interim plan to maintain and update the central location for Gen AI policies, practices, and information. Designation of the MSA RAIL Leadership Team to oversee this process. Transition to the Gen AI Policy Group (specifically subcommittee) once established for ongoing and consistent communication to all school adults.
- 3. Curate, update, and maintain a collection of Generative AI tools that are particularly useful and exciting for teaching, learning, and professional tasks, and publish this collection in a centralized location**
- a. Additional Recommendation from Collaborative Group:
 - i. Interim plan to curate, update, and maintain the collection of Generative AI tools within the Gen AI Portal Page. Designation of the

MSA RAIL Leadership Team to oversee this process. Transition to the Gen AI Policy Group (specifically subcommittee) once established.

4. **Teaching faculty should make the implicit explicit in all assignments by articulating the goal and purpose of the assignment and then indicate the Acceptable Gen AI Roles:**
 - a. Additional Recommendation from Collaborative Group:
 - i. Similar to the [Acceptable Gen AI Roles at Choate \(students\)](#), all school adults should use the [Acceptable Gen AI Use for Professional Tasks at Choate](#) to discuss and determine the levels of appropriate Gen AI use within each department and/or role for professional tasks. Each department should be tasked to engage in the exercise to customize their own chart at a departmental and individual level.
5. **Develop an ongoing, incremental, and robust professional development plan regarding use of Gen AI for staff**
 - a. Additional Recommendation from Collaborative Group:
 - i. In alignment to the Strategic Plan, “develop a plan of trainings that should be required of all employees and by role” and “provide financial resources and time allocation...to receive professional development opportunities.”
 1. Identifying a balance and recognizing the need for school-wide professional development and department or role specific professional development. Designation of the Gen AI Policy Group to seek input from staff and faculty to identify such opportunities. School-wide professional development should be mandatory and provide staff with the resources (e.g. time) to attend such opportunities.
 2. Regular, open sessions such as Lunch & Learns (recommended monthly with dates, times, and locations secured prior to the academic year). These would be best led by facilitator(s) such as some members of the Gen AI Policy Group Subcommittee. They could be more effective by being divided into subgroups by one of the following: departmental, experience level, professional use case or application, project/task types, software similarities, etc.
 - a. Institutional approval and support for every staff to participate in, at minimum, two sessions in each 12-month period.
 3. Explicit communication and recognition from supervisors to prioritize Gen AI opportunities. Such explicit support will provide the reassurance necessary to continuously explore and grow with Gen AI.

4. Budget prioritized for Gen AI specific professional development opportunities. Clear budget allocations will allow the Gen AI Policy Group to better identify the potential professional development opportunities available.
 5. Providing access to Canvas for staff to engage in the AI Literacy and Awareness self-paced curriculum on topics relevant to professional tasks (e.g. Using AI in Professional Tasks, Ethics and AI: Reflecting on AI Itself, etc.).
- 6. In consultation with relevant parties such as school counsel and tech security experts, articulate specific institutional policies regarding meeting copyright and confidentiality institutional standards when using Generative AI tools**
 - a. Additional Recommendation from Collaborative Group:
 - i.
 - ii. Identifying and inviting external experts within these fields to further advance Choate professionals specifically interested in these topics. The Gen AI Policy Group should be included in such discussions to build foundational knowledge on this topic to impact the policies around it.
 - iii. ITS to create a Data Classification & Handling System for clarification on types of data confidentiality and standards (see rec below)
- 7. Continue to review, assess, and identify specific Gen AI Platforms that best meet the learning, teaching, and work goals for the community and purchase access as necessary**
 - a. Additional Recommendation from Collaborative Group:
 - i. The Gen AI Policy Group to regularly meet and provide this for business and administrative operations.
 1. Findings of this group would be compiled and shared (published to the Gen AI Portal).
 - ii. Follow ITS procurement plan (see rec below)
- 8. Explore options for developing our own internal Generative AI tools to meet the specific needs of the Choate community**
 - a. Additional Recommendation from Collaborative Group:
 - i. Provide support to ITS for the research toward and potential development of internal Gen AI systems, tools, integrations, etc.
 - ii. Provide resources and support to AI group members, specialists, collaborators to explore integrations that would leverage custom, GenAI agents to serve as powerful assistants, able to access, summarize and communicate various institutional data (Microsoft SharePoint, OneDrive, Azure, etc) and messaging.

Generative AI Collaborative Group Recommendations beyond Generative AI Steering Committee

1. Recommendations specific to ITS

- a. Roles
 - i. Offer professional development for a current ITS member to obtain proficiency and baseline Gen AI literacy in current technical trends and implementations, e.g., data/cybersecurity, privacy, systems until a Technical Gen AI Expert/Specialist is hired or identified.
 - ii. Hire or identify a Technical Gen AI Expert/Specialist who is familiar with the school's current systems and integrations. Ideally, should have experience, education and/or certifications relevant to AI systems, adoption, integrations, policies, governance, training (e.g., Microsoft Azure AI/OpenAI, LLMs, ML, prompt engineering, instruction)
- b. Procurement Update
 - i. Expand current procurement process and policy to include the approval and purchase of Gen AI tools.
- c. Student Handbook Update
 - i. Update the "Information Technology Services: ipads, laptops, computers, and smart phones" section to include the use of Generative AI consistent to the guidelines that currently exist.
- d. Faculty & Staff Handbook Update
 - i. Update the "Technology- Acceptable Use" section to include the use of Generative AI consistent to the guidelines that currently exist.
- c. Data Classification & Handling System Creation
 - i. Creating a data classification and handling system can help data managers better understand how to responsibly manage, store/protect and share various classifications of data with AI systems *and* other systems. It can also help when referencing different types of data in guides and policies. To ensure data security and privacy, establish a resource that indicates the tools that can be used for select data sets.
 - ii. *Examples:* [Harvard \(Quick Reference Guide \[PDF\] | Collaboration Tools Matrix | Data Lifecycle\)](#), [Vanderbilt](#), [Northwestern](#), [KU](#)
- d. Lead Organization-wide Change Management Plan
 - i. Develop an implementation plan in collaboration with the Gen AI Policy Group for any Gen AI tool/system that may be implemented for larger scale adoption.

- ii. Create an Adoption Plan for Microsoft Copilot:
 - 1. [Copilot](#) (standalone w/data protection). This feature was rolled out to faculty and staff as part of their existing Microsoft licenses.
 - 2. [Copilot for 365](#) integrates Copilot directly in the Microsoft 365 suite of apps and adds additional features to the standalone app. It is a paid upgrade.
 - a. The early adopters (since March '24) should collaborate and report their findings to the Gen AI Policy Group who would determine its viability. Access could be limited to appropriate departments and constituents.
 - b. Identify who should get licenses.
 - 3. [Adoption resources](#) (folders and files). Useful for administrators and organizers in charge of change management (leadership, IT, Communications).