

#1 Budget Summary Prompt Structure:

Act as a Minnesota school business official? Summarize this budget narrative for a school board audience? Limit to 250 words? Highlight risks and strategic options? Provide 5 likely board questions?

(Attach Board Summary)

#2 HR Interview Question Prompt Structure:

Act as an HR director at Whizbang Schools? Create interview questions for an Accounts Payable Clerk familiar with UFARS coding? Include behavioral and technical questions?

Refine Prompt:

Rewrite to emphasize problem-solving?

#3 Prompt Structure:

Summarize the key issue in 3 bullet points? Draft professional response? Tone: calm, firm, solution-oriented?

Refine Prompt:

Make it warmer?

Make it more direct?

UFARS Code Generator:

<https://ufars.bondwood.ai/>

Artificial Intelligence (AI) for Dummies 2.0



Minnesota Association of School Business Officials



Artificial Intelligence (AI) for Dummies 2.0

From Curiosity to Practical Application

Andrew Beenken-Adams
Director of Business Services,
Waseca Public Schools
MASBO President-Elect



.....And Artificial Intelligence!

Today's Objective:

From Curiosity → Practical Application

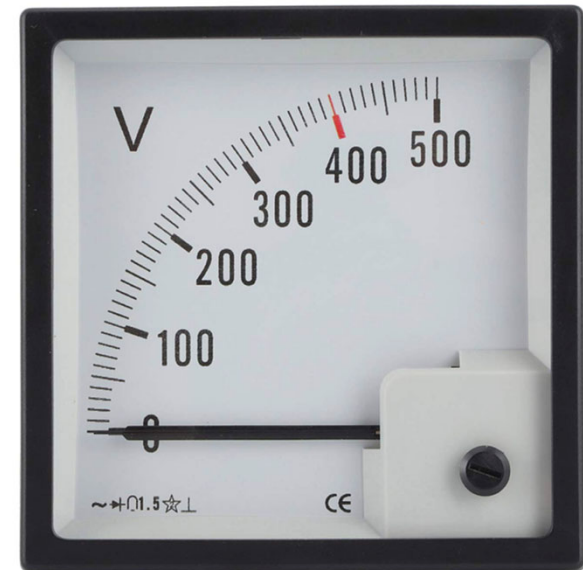
See Real Workflows in Action

Understand Where AI Helps

Understand Where AI Still Needs YOU!

Formative Assessment

**What is your current
level of familiarity
with generative AI
Tools?
(i.e. ChatGPT)**



Quick Reframe

AI is not replacing school business professionals.

- It is replacing friction.**

If you never use AI, nothing breaks.

- If you experiment responsibly, your workflow changes.**

What's Changed?

AI embedded in Microsoft & Google environments

Document + Spreadsheet Analysis

Multimodal (*text, PDF, images, raw data*)

Increased Local Policy Development

Staff Expectations Rising

AI is becoming infrastructure!

What Generative AI Actually Is...

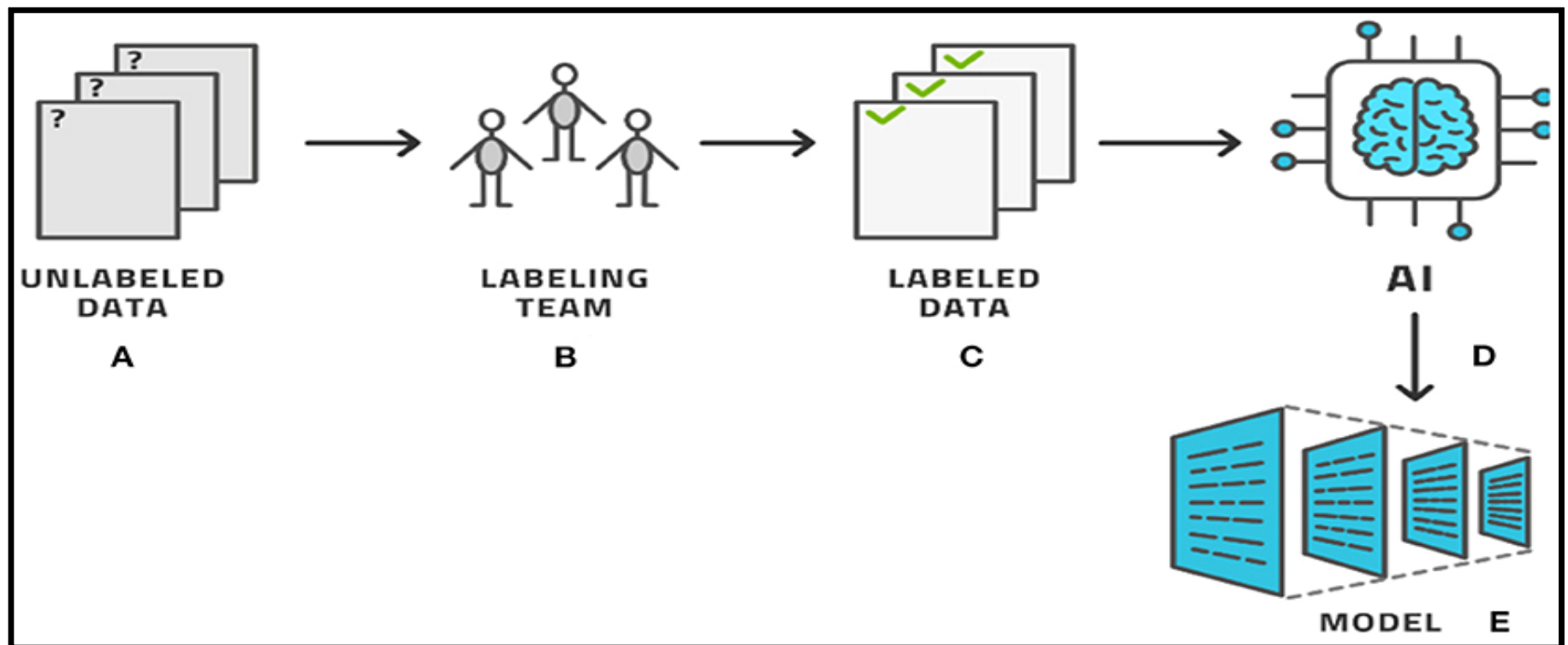
Generative AI is:

- **A drafting engine**
- **A Summarization tool**
- **A pattern recognition system**
- **A workflow accelerator**

It is not:

- **A decision maker**
- **A compliance officer**
- **A replacement for professional judgement**
- **Sentient / alive**

Practical Workflows



Workflow #1: Finance Office Reality

Scenario: Whizbang Schools faces a projected \$1.2M shortfall.

Common tasks:

- Board summaries
- Risk explanations
- Executive overviews
- Anticipate board questions

Budget Summary **(Live Demo)**

Prompt Structure:

Act as a Minnesota school business official. Summarize this budget narrative for a school board audience. Limit to 250 words. Highlight risks and strategic options. Provide 5 likely board questions.

What Just Happened?

AI:

- **Drafted quickly**
- **Structured thinking**
- **Anticipated questions**

You:

- **Reviewed**
- **Adjusted**
- **Ensured Accuracy**

AI Drafts → You Decide.

Workflow #2: HR & Hiring

Common HR Uses:

- **Job descriptions**
- **Interview questions**
- **Onboarding checklists**
- **Difficult communication drafting**

Interview Questions **(Live Demo)**

Prompt Structure:

Act as an HR director at Whizbang Schools. Create interview questions for an Accounts Payable Clerk familiar with UFARS coding. Include behavioral and technical questions.

Refine Prompt:

Rewrite to emphasize problem-solving.

Workflow #3: Email Efficiency

Common pain points:

- Long MDE emails
- Emotional parent communication
- Complex internal updates
- Tone calibration

Email Drafting (Live Demo)

Prompt Structure:

Summarize the key issue in 3 bullet points. Draft professional response. Tone: calm, firm, solution-oriented.

Refine Prompt:

Make it warmer.

Make it more direct.

Tone is adjustable.

Judgment remains human.

Skill Building



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Prompting Like the Professionals

Most people prompt like this:

“Summarize this data.”

Professionals prompt like this:

ROLE → TASK → CONTEXT → CONSTRAINTS → FORMAT

Strong Prompt Example

Act as a Minnesota school business official.

Summarize this financial report for a board audience.

Limit to 250 words.

Maintain a neutral tone.

Provide bullet points.

Clarity = Better Output

Where AI Still Needs You!

- **Verify Accuracy**
- **Protect confidential data**
- **Watch for hallucinations**
- **Recognize bias**
- **Follow district policy**

AI is a powerful Intern.

You are still the professional.



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Data & Privacy Reminder

Do **NOT** upload:

- **Student identifiable information**
- **Personnel private data**
- **Non-public financial records**

When in doubt:

- **Remove names**
- **Generalize numbers**
- **Use summaries**

Leadership Application

As I step into a new district, I've used AI to:

- Review onboarding documents
- Summarize policies and procedures
- Create transitions outlines and guides
- Prepare communication drafts



AI accelerates preparation & learning.

It does not replace leadership.

The Opportunity

AI won't replace school
business professionals.

It WILL reward those who have
the **COURAGE** to learn it!

Andrew Adams & Cindy Olson



The Challenge

Try AI this week for:

- **Summarizing a report**
- **Drafting a board memo**
- **Improving tone in an email**
- **Creating interview questions**

Start Small.

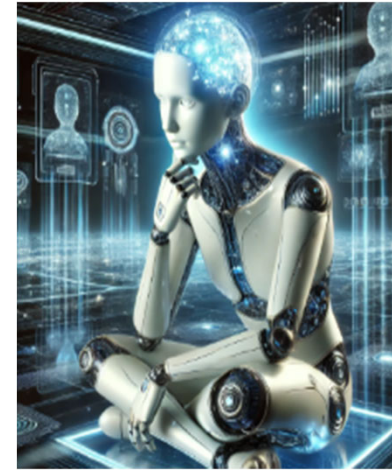
Start Safely.

Start this week!

Questions?



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Chat GPT, self identified

What could you use this for tomorrow?

UFARS Code Generator:

<https://ufars.bondwood.ai/>

Please note – every search has a token cost, but every time you provide proper feedback, we help enhance the model.

Expert Tip – “**Alt + Enter**” starts a new line within a prompt just like in Excel!

Scenario #1 - Budget Summary

Prompt Structure:

You are a school business official? Summarize the following school district budget narrative for a school board with no finance background?

Keep it to one page, use plain language, and include:

Key financial challenge

Major drivers of the deficit

3 key takeaways for the board

Here is the document: (Attach WHIZBANG Schools Board Summary)

Now try the following prompt:

You are a Director of Business Services? Summarize this budget for a school board, highlight financial risks, identify what decisions may be required, and include 2 thoughtful discussion questions for board members?

Now try the following prompt:

Act as a skeptical school board member reviewing this budget? Generate 8 thoughtful and challenging questions you would ask during a board meeting?

Now try the following prompt:

Now answer each of those questions as a Director of Business Services in a clear, professional, and transparent tone?

Lets take it up a level - try the following prompt:

You are a school district finance expert. Based on this \$12 million budget deficit, propose three budget reduction scenarios:

1. Conservative (minimal impact to classrooms)

2. Moderate (balanced approach)

3. Aggressive (significant reductions)

For each scenario include:

- Specific strategies**
 - Estimated impact**
 - Pros and cons**
 - Potential risks or community concerns**
-

Scenario #2 - Difficult Email / Communications

Prompt Structure:

Draft a response to a parent regarding unpaid school fees that are being written off.

The message should:

- Be respectful and professional**
- Avoid setting a precedent that fees will always be forgiven**
- Reinforce expectations moving forward**
- Maintain a positive relationship**

Here is the situation:

We have a family that does not qualify for Free or Reduced Lunch and participates in many different activities. The family has hit the maximum for activities fees and has been slow to pay those each year, but tends to get them caught up by the end of the school year, just not during the particular season. The family has not paid any additional amounts toward field trip costs, technology breakages, replacement power cords for student devices, or materials to participate in electives. The amount now exceeds \$500 and their last student will be graduating this spring. We have called and

talked to the family on numerous occasions and they keep telling us they will “get caught up” before the end of the year? We have yet to see any payments and it is now March 2026?

Scenario #3 - Enrollment Impact

Prompt Structure:

A school district is projecting a loss of 75 students? Estimate the financial impact on the general fund?

Explain:

- Assumptions used
- Approximate revenue loss
- Secondary impacts the district should consider

Keep the explanation simple and practical for district leadership?

Scenario #4 – Board Memo Builder

Prompt Structure:

Rewrite the following information as a one-page school board memo?

Include:

- Clear summary of the issue
- Recommendation
- Supporting rationale
- Professional tone appropriate for a public meeting

Here is the content:

[PASTE RAW OR MESSY TEXT]

AI WORKSHOP

Hands-On Training for School Business Officials



• BONDWOOD

UFARS Code Finder

Describe an expense or revenue in plain language.

Get D1-validated UFARS coding with ranked alternatives.

Auto-detect

Expenditure / Revenue

Balance Sheet

e.g. Purchased new textbooks for 8th grade science classes...

Enter to search - Shift+Enter for new line

Find Codes

TRY AN EXAMPLE

Teacher salary for 5th grade math instruction

Electricity bill for the high school

New Chromebooks for elementary classrooms

Bus contract for special ed transportation

Federal Title I grant revenue

Roof replacement funded by LTFM

School lunch food purchases

Health insurance for district office staff

UFARS Lookup Tool? YES PLEASE!!

Correct Answer!

■ BONDWOOD

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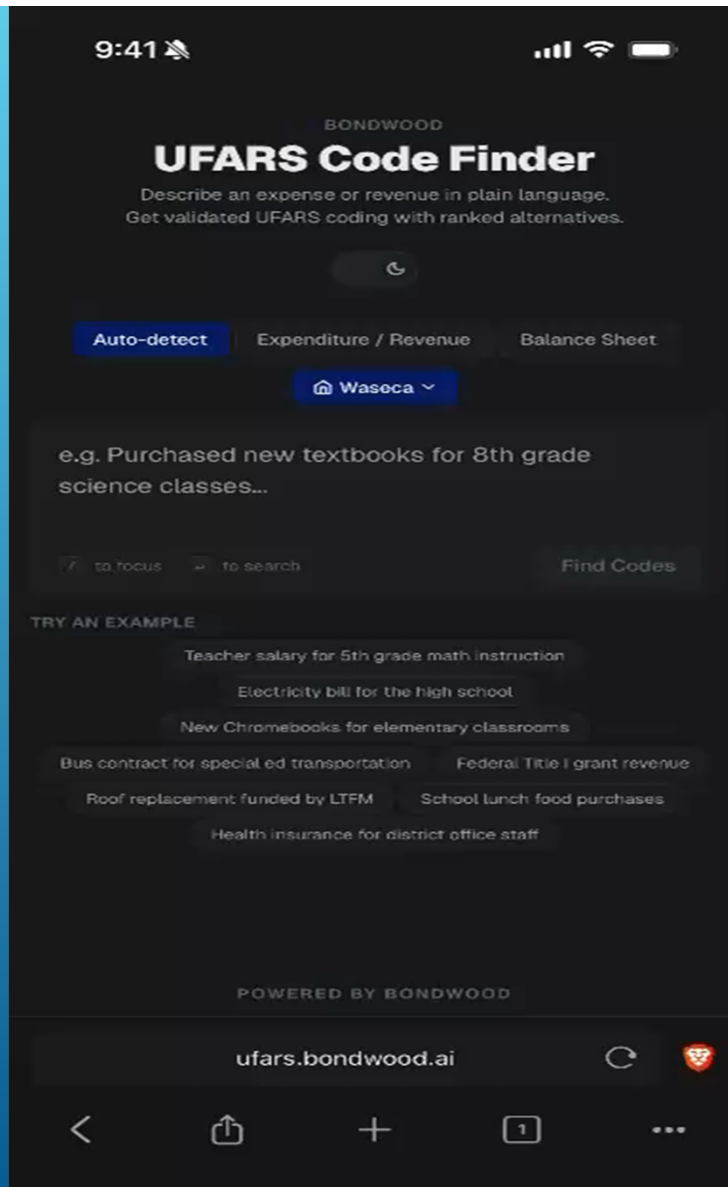
Roof replacement funded by LTFM

School lunch food purchases

Health insurance for district office staff

UFARS Lookup Tool?

When it needs help...



UFARS Lookup Tool?
Lets try something
harder...

• BONDWOOD

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Auto-detect

Expenditure / Revenue

Balance Sheet

Select District

e.g. Purchased new textbooks for 8th grade science classes...

/ to focus - to search

Find Codes

TRY AN EXAMPLE

ltfm consulting environmental health and safety management

superintendent salary

school lunch federal reimbursement

food services consulting fees/fees for services

music vehicle purchase operating capital

physical therapist salary SPED

EL teacher salary

food service worker salary

POWERED BY BONDWOOD

Now its
our turn!

[https://ufars.
bondwood.ai/](https://ufars.bondwood.ai/)

What else could you use AI for tomorrow?

YOUR TURN



THANK YOU!!



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Chat GPT, self identified