How the Canadian Centre For Christian Charities is Using AI as a Writing Assistant

Paul B. Wolfe
CCCC Head of Knowledge and Publications

Introduction

This article explores the Canadian Centre for Christian Charities' (CCCC) journey with generative AI—the various software applications that generate words, code, and analysis. Most of our research is still underway, so we are forthright about our concerns. We freely share with you our self-imposed limitations when using OpenAI's ChatGPT and other third-party applications powered by AI. However, we also share our optimism about its potential to help craft better communications and work more efficiently. Finally, we suggest several experiments people on both sides of the philanthropy equation can try as they learn about ChatGPT and other generative AI.

How CCCC got started with AI

CCCC's programs are diverse and many. They include an accreditation program, a pension program, a benefits program, a help desk, and resources aimed at helping our 3000+ members navigate operational and regulatory complexity. CCCC's wide variety of programs generate a lot of documents! So, earlier this year, when rumours of ChatGPT started buzzing, we decided to explore its potential benefits. Presently, only two of our departments use AI as a writing assistant. Our marketing department uses it to generate copy for channels like email and social media while our publications department is using it to generate document summaries, outlines, drafts, and for copyediting. This is a fraction of the possible applications for AI, ranging from minute-taking to financial analysis.

AI as a writing assistant for marketing communications

CCCC's journey with generative AI began in our marketing communications department. In this digital age, crafting the right message and delivering it to the right audience at the right time can be a daunting task. Larger charities have teams of people with specialized skill sets to manage print, digital, and social media. Smaller charities limit themselves to one or two methods of communication, such as a website, an email newsletter, or a Facebook account. CCCC is in the middle. We have big communication needs but a small team. So, we rely on our tools, and AI was an emerging tool we wanted to explore.

The first AI tools CCCC encountered were add-ons to programs we already use. While all of us were in the thick of the pandemic, many existing software companies were quietly experimenting with AI. CCCC was invited to test beta versions of note-taking assistants, image generators, and transcribers that were add-ons to tools we already used. The few trials we tried didn't work well. They were a novelty. But, when Copy.ai arrived, writers took notice en masse (Daso 2021). In early 2022, we started using Copy.ai to optimize the content for our emails and social media posts. Our Head of Marketing & Communications is still responsible for the quality of everything that goes out, but the process of managing various outlines, drafts, revisions, and approvals is sped up. This is because Copy.ai was one of the first reliable applications of AI that was easy to implement in our workflows. The interface helps non-technical people create instructions (prompts) for the AI, removing the need to learn how generative AI works. It was a quick decision because it enabled our Department Head to spend more time managing communications and less time writing drafts.

Generative AI tools spread quickly through the marketing world for two reasons. First, chatbots are designed for engaging communications—they work very well for SEO, ad copy, and social media. Second, people in marketing communications already know what they're looking for—they already know how to write and how to identify effective writing. Copy.ai was one of the first to work, but now there are many (G2 2023).

This remains the most common way people use AI. They keep using the tools they already know, but choose to add in the functionality of AI as it becomes available. For readers who are just getting started with generative AI, we'd recommend you start with a trial of a third-party application.

Identifying other uses for generative AI

By February 2023, over 100 million

people had signed up for ChatGPT, and 13 million people were using it on a daily basis (Hu 2023). People were learning to write their own prompts, and using it to write first drafts of novels, computer code, instruction sets, poems, and help desk articles. AI had forced itself into my world, but for AI to be useful, it must be reliable, keep information safe, and produce a consistent product. I decided to start learning through experimentation.

Selecting source material to work with

Our team is familiar with documents like the Registered Charity Information Return T4033; Clergy Residence Deduction T1223; and how to draft the purposes for a charity GC-019. These documents are in the public domain and ChatGPT is already familiar with them. Since our team knows and already uses these guidance documents, they seemed a natural choice of source material to use for experiments.

Selecting a real-world problem to solve

CCCC is a mid-sized charity with a diverse team of professionals in HR, marketing, IT, legal, accounting and communications. While our team is unified by our support for Christian charities, our team members often find themselves speaking different professional dialects and working with methodologies learned through their training. A common way this reveals itself is when we create documents. As the person responsible for managing CCCC's knowledge base, one challenge is determining where one professional world should end and where another should take over in our resource and document development.

My real-world problem and related research question was, "Can ChatGPT help identify, and make more efficient, the process of creating training and guidance documents, while retaining the authoritative writing requirements of various professions?" This is what I discovered through my research so far.

Privacy and legal considerations when working with ChatGPT

ChatGPT exists to become better

ChatGPT is a grand experiment with broad terms of service. Its goal is to become better, not to deliver a particular level of service within a particular jurisdiction. From OpenAI's perspective,

> the information people enter into ChatGPT is primarily used to help train the software. This means that if people enter enough trade secrets or proprietary methodologies as part of their prompts, ChatGPT will eventually recognize them and be able to replicate them. For example, if you ask, ChatGPT can write in the style of William Shakespeare or Christopher Walken, because enough of their work is publicly available.

Currently, several provinces and the Government of Canada have a joint investigation into OpenAI. They want to ensure that OpenAI is gaining adequate consent for the collection, use, and disclosure of the information entered into the software (Office of the Privacy Commissioner, 2023). This is good governance. The current state of generative AI is very similar to the early days of Uber, which did not differ from getting into a car with a stranger unregulated, and really only designed to see if ride-sharing would work. It did, and now using Uber is a commonly used, regulated service. But the methods, rules, regulations, and boundaries of ride-sharing evolved; all as the service grew. It was messy, and for now, so is AI (Taratino and Walters 2023).

Because we understand it's still an experiment, we've constrained our information to a few subject areas we know well. By constraining our dataset, we've been able to focus on processes, consistency, and outcomes. To extend the Uber analogy, we've tried taking it to work once or twice a week. We haven't sold our car and given up our driver's license.

AI can help make decisions, but you need to disclose how you use it

Canada is developing a set of rules to govern the creation and use of emerging forms of AI. It's called the Artificial Intelligence Development and Application Act (AIDA). At this point, the forms of AI governed by AIDA aren't clearly defined. But they will include AI that can potentially harm people's health and safety, or violate their human rights, whether on purpose or by accident. The rules will also consider whether the system disadvantages certain groups of people or if there are already other laws that address the risks it poses. AIDA will also govern AI systems that can process data about human activities and generate content or make decisions, predictions, or recommendations (Lucarini and Walters, 2023).

The AIDA will be particularly important to granting organizations that use AI to set funding priorities, allocate budgets, and evaluate proposals. Note that AIDA will have requirements for risk management, record keeping, notification, and transparency. There will also be penalties for noncompliance.

Suggestions to help you experiment with AI

Buy the paid version

OpenAI encourages people to use the latest version of the software, which is GPT-4, and it is only available through a paid subscription. When you start a new chat, the free version has only 2000-5000 words to use between your question and the answer it generates. If your question is long or it contains a document, the answer is often truncated and must be generated through a series of continuations. With GPT-4, you can analyze documents of 12,000 words and still have answers of equal length, and the current 25,000 envelope seems to be expanding as the product develops. For an excellent summary of GPT-4's full specifications, I would encourage you to read Mohammed Lubbad's comprehensive article in Medium.com (Lubbad, 2023).

Watch videos until they start to become redundant

There are hundreds of excellent tutorials on YouTube about how to get started with any version of ChatGPT. In fact, there's more than usual because GPT can be used to write outlines and scripts for instructional videos! There's been a flood of people creating videos that all seem the same and it is helpful to watch videos until they become redundant. Then start searching for videos on specific skills.

If you find you're not interested in learning how to prompt ChatGPT, be assured there are thousands of skilled tech professionals building new GPT powered start-ups. Every knowledge-based indus-

try, including the RFP software developers, is seeking ways to make using generative AI easier. Keep your eye out for new easy-to-use apps that meet your needs or ask the software providers you already use if they are building an add-on feature. Currently, almost a dozen programs we use at CCCC have beta or active AI functionality.

For those who prefer to read, OpenAI has a helpful starter's guide written by Jessica Shieh called *Best practices for prompt engineering with OpenAI API*.

Create a prompt library

Creating a prompt library is helpful if you want consistent and reliable results from GPT-4. You can organize them by function or document type. Prompts can be used for analysis, comparison, revision, copyediting and idea generation. They can be gathered or varied through experimentation, from articles and videos that teach you how to accomplish specific tasks, or even by asking ChatGPT for suggestions about how to get the results you want.

As you use them, you can improve them. This will save time and help you track progress as you continue experimenting. It also helps you adjust your work as ChatGPT evolves over time. A prompt used a month ago will yield a different result today, so it's helpful to know how it worked last time. Keeping records can improve your work over time.

Examples of experiments

In this final section, I provide three examples of experiments I ran to help me see if ChatGPT could help me break out mundane writing tasks from CCCC documents so that our professionals could focus on more high-value writing. Then, I provide three experiments for grant makers and three for grant writers. Each experiment has a title, an explanation of the expected end-result, and a suggested prompt you can put into any version of ChatGPT. I encourage you to try them.

• • •

CCCC documentation experiments

Identify the instructions and steps within a document.

Government documents often conflate definitions, suggestions, and steps. They also tend to run off on rabbit trails, trying to address every possible scenario for every possible charity. It is a time-consuming task to read, understand, and break out ordered steps when a list is not already provided. To save our professionals' time, I used this prompt on government documents and forms to identify instructions and steps within a document. Our professionals only need to validate or improve the list.

Suggested prompt: "This is text from a government form. Please analyze the information and rewrite it as a series of steps. Name each step. ### {paste text here} ###."

• • •

Create a glossary from a document

Government documents often have technical or legal terms. Some are defined, but many aren't. This can be particularly difficult for new Canadians or lay people in volunteer roles. While glossaries do exist, it is tedious to ask experienced professionals to locate or write glossary definitions. I used this prompt on government documents and forms to identify important terms. Our professionals only need to validate or improve the definitions.

Suggested prompt: "This is text from a government form. Please analyze the information and identify important terms. Write glossary definitions for each term using this format:
Name of Term
Glossary Definition
Example
{paste text here} ###."

• • •

Create a learning module outline from a document

This is a more complex prompt. It explains what GPT is reviewing, what it should do, and sets an order for the results. For this example, I've used Section D of T4033 as my target document. I would then paste the text into the correct location in the prompt. I've used this prompt to help me create outlines for resource manuals. I've also compared and contrasted the results of these prompts to our existing resources, looking for ways we can improve. This level of analysis helps us plan our writing and revisions.

Suggested prompt: "This is the text from Section D of the T3010. Please create the outline for a learning module that will help a person complete Section D.
- Include headings
- Write an introduction paragraph for each heading
- Identify important terms
- Write an introduction and conclusion for the whole module
- Write an example exercise for the whole module that includes financial figures ### {paste text here} ###."

Experiments for grant reviewers and program managers

Create grant evaluation criteria for a range of ages and geographical regions.

The criteria for evaluating grant applications can vary based on the specifics of the project. With GPT-4, grant evaluators can create a customizable and comprehensive set of evaluation criteria that can be tailored to each unique grant application.

Suggested prompt: "Create a set of evaluation criteria for a grant application for a community arts initiative focusing on youth engagement. The evaluation criteria should consider age ranges (e.g., early childhood, adolescence, young adulthood) and geographical regions (e.g., urban, rural, suburban) to ensure inclusivity and relevance to diverse youth populations."

• • •

Create a list of questions for grant applicants that request program data and long form answers

When reviewing grant applications, it's crucial to ask applicants the right questions to gather additional information or clarify certain aspects. GPT-4 can be used to generate a list of relevant questions based on the contents of the application.

Suggested prompt: "Generate a list of open-ended questions for a grant applicant proposing a project to provide clean drinking water in a remote community. The questions should solicit detailed information, including specific numerical or financial data, to better understand the project's budget, cost estimates, funding sources, and sustainability plans. Number each question and group questions under headings."

• • •

Reviewing and providing feedback on grant applications

For those who review grant applications, GPT-4 can be a useful tool for generating detailed and constructive feedback. By providing the AI with key aspects to consider (such as clarity, relevance, and feasibility), grant evaluators can automate the initial review process and focus on more nuanced considerations.

Suggested prompt: "Review a grant application that seeks to improve literacy rates in rural areas. Focus on clarity, relevance to the community, and feasibility of the proposed solutions. Create headings for each section."

Experiments for grant writers to various grant programs

Arts program stressing cultural diversity and inclusion in a metro area

This prompt helps focus GPT on an arts grant for cultural diversity and social inclusion in a metropolitan area. The result should highlight the importance of engaging underrepresented communities, fostering collaboration among diverse artists, and emphasizing the potential impact on local cultural heritage. This would create an initial draft that a writer could improve.

Suggested prompt: "Develop a grant proposal for an arts program that aims to promote cultural diversity and social inclusion in [city name] metropolitan area. Emphasize the program's ability to engage underrepresented communities, foster collaboration among diverse artists, and highlight the potential impact on local cultural heritage. ### {paste program report here} ###."

• • •

Science scholarship grant

This prompt will create a first draft for a science scholarship grant. Grant writers should also be able to add supplementary material such as a transcript or student's CV. The proposal will focus on promoting equity and diversity in STEM fields by showcasing their program's ability to support talented students from underrepresented communities and empower them to pursue science careers.

Suggested prompt: "Create a grant proposal for a science scholarship program targeting high-achieving students with a particular interest in biology. Focus on the importance of fostering scientific curiosity, providing mentorship opportunities, and addressing barriers to access in science education to promote equity and diversity in STEM fields. ### {add CV here} ###"

• • •

Operational grant for a building

This is a prompt for a general operational grant. It focuses the writer's attention on the benefits of the building rather than the need of the organization. It gives the writer placeholders where they can insert operational figures and discuss variances. It is a good first draft.

Suggested prompt: "Prepare a grant proposal for an operational grant to support the maintenance and sustainability of a community center building. Outline the building's role as a hub for social services, education, and recreational activities, and demonstrate how the grant will ensure efficient facility management, promote energy efficiency, and improve accessibility for diverse community members."

Conclusion

As we conclude, you may be wondering if we used AI to help write this article. Yes, absolutely. We used GPT to create an initial outline, and to do the first drafts of the experiments that were not developed by CCCC. We used it to generate ideas or options on how the article could go. Then we selected the options that worked best. We used it to have chats about some of the resources we reference, and GPT's responses influenced our thinking. We used it to proofread and copyedit the article, and often it provided clearer ways of saying things. We could not use GPT-4 for primary research as most of this article is based on personal experience. Ultimately, every paragraph in this article had to be written, edited, reviewed, and approved by a human. The real benefit is that we were able to do all this a bit faster using AI.

The path to a safe, secure, and reliable integration of AI into CCCC's workflows will be a long journey. We are having some success using it to analyze documents, create lists, write glossary terms, and identify ways we can improve. In the long run, it is likely that we will leave the prompt engineering up to third-party apps and only use GPT-4 for specific analysis tasks.

References (in alphabetical order)

Daso, Frederick. "Copy.ai Revolutionizes Digital Marketing By Augmenting Human Creativity With AI." https://www.forbes.com/. Forbes, January 25, 2021. https://www.forbes.com/sites/frederickdaso/2021/01/25/copyai-revolutionizes-digital-marketing-by-augmenting-human-creativity-with-ai/?sh=56a48e843988.

Hu, Krystal. "ChatGPT Sets Record for Fastest-growing User Base - Analyst Note." https://www.reuters.com/. Reuters, February 2, 2023. https://www.reuters.com/technology/chatgpt-sets-record-fastest-growing-user-base-analyst-note-2023-02-01/.

Lucarini, Luca, and Noah Walters. "Part 2: Canada's Evolving Artificial Intelligence and Privacy Regime." https://www.dentons.com/. Dentons, April 4, 2023. https://www.dentons.com/en/insights/articles/2023/april/12/part-2-canadas-evolving-artificial-intelligence.

"OPC to Investigate ChatGPT Jointly with Provincial Privacy Authorities." https://www.priv.gc.ca/. Office of the Privacy Commissioner of Canada, May 25, 2023. https://www.priv.gc.ca/en/opc-news/news-and-announcements/2023/an_230525-2/.

Shieh, Jessica. "Best Practices for Prompt Engineering with OpenAI API." https://www.openai.com/. OpenAI, June 1, 2023.

https://help.openai.com/en/articles/6654000-best-practices-for-prompt-engineering-with-openai-api.

Tarantino, Bob, and Noah Walters. "Key Legal Considerations with Generative AI." https://www.dentons.com/. Dentons, April 4, 2023. https://www.dentons.com/en/insights/articles/2023/april/4/key-legal-considerations-with-generative-ai.

"Top 10 Copy.ai Alternatives & Competitors." https://www.G2.com/. G2.com, June 19, 2023. https://www.g2.com/products/copy-ai/competitors/alternatives.