



Image generated with AI (ChatGPT)

HOUSING ACTION ILLINOIS
2026 HOUSING MATTERS CONFERENCE

The Responsible Innovation Blueprint

Aligning AI Adoption with Your Mission

Moving from defensive anxiety to governed leadership

Steven J. Casey

Principal, Kindred Impact LLC

Wednesday, September 30, 2026 · 10:15–11:30 AM

I Hotel, Champaign, Illinois

AGENDA

Today's Roadmap

1

The Reality Check

15 min

Where AI already lives in your work, and what it puts at risk.

2

The Framework

20 min

A four-stage human-centered filter for every AI-assisted task.

3

The Blueprint

20 min

An 8-week plan to move from ad-hoc use to adopted policy.

4

Funder Readiness

20 min · incl. Q&A

Turning governance into credibility with funders and boards.



What you leave with

A governance framework, a vendor scorecard, an equity screen for housing data, and an 8-week plan.

The Landscape in Housing & Homelessness Work

Housing Action Illinois' 200+ member organizations are stretched thinner than ever.



The Pressure

- Rising need and volatile funding
- Understaffed intake and case management
- HMIS entry, waitlists, and grant reports piling up



The Temptation

- Tools that promise hours back this week
- No procurement process, no cost, no approval
- Adopted quietly, one staff member at a time

“Digital debt” is the gap between manual administrative burden and the pressure to serve more people with the same staff.

The question isn't “AI or no AI.” It's governed AI or ungoverned AI.

THE REALITY CHECK

Unveiling the “Shadow Kitchen”

Staff are already using AI — with or without your board's permission.



ChatGPT

Grant narratives, case notes, tenant letters



Otter.ai

Transcribing intake interviews and case conferencing



Canva AI

Outreach flyers, newsletters, campaign materials



The Risk

A hallucinated figure in a HUD report. A client's immigration status typed into a public chatbot.



The Opportunity

Govern this first and you earn funder trust, board confidence, and staff clarity — before an incident forces it.



Image generated with AI (ChatGPT)

Name Your Shadow Kitchen

4 MIN

1

What's one AI tool you know — or suspect — is already being used somewhere in your organization?

2

What's the worst-case headline if that tool used your data the wrong way tomorrow?



How it runs

Two minutes with the person next to you. Two minutes of report-back — I'll take two or three out loud.

The Head Chef Rule: AI Assists, Humans Author

Think of your organization as a professional kitchen.



The Line Chef (AI)

Handles the prep work: drafting, summarizing, sorting, transcription. Fast, tireless, and without judgment.



The Head Chef (Human)

Final taste, ethical judgment, and accountability. Decides what leaves the kitchen and signs their name to it.

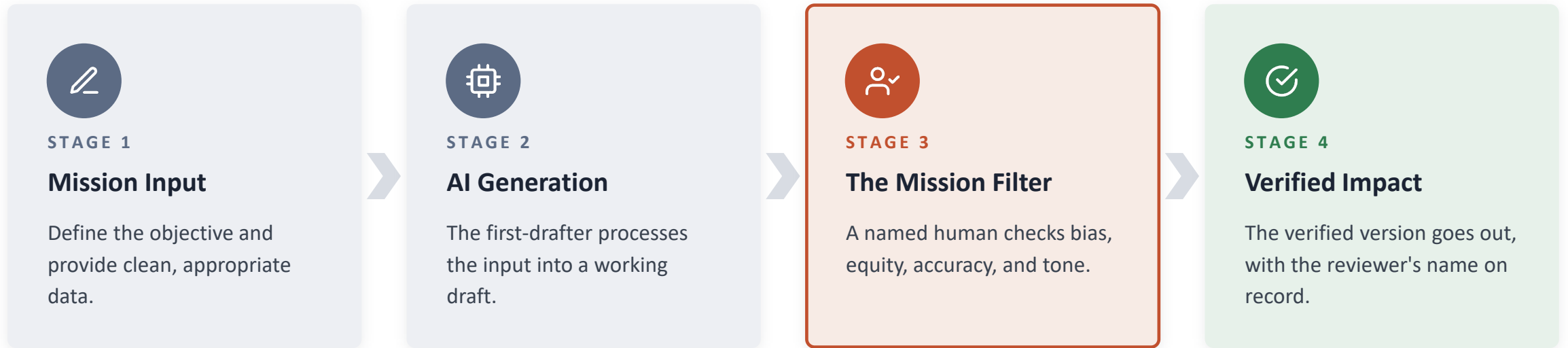


If the Head Chef doesn't sign off, the plate does not leave the kitchen.

Every AI-assisted intake summary, grant narrative, board memo, or tenant-facing letter needs a named human author.

The Human-in-the-Loop Mission Filter

A four-stage checkpoint for every AI-assisted task — from a grant report to a tenant letter.



Stage 3 is the braking system. No output reaches a client, donor, or funder without passing through it.

The Equity Screen for Housing Data

AI systems learn from historical data — and housing data in America carries the fingerprints of redlining, exclusionary zoning, and biased lending.



Zip-code proxies

Down-ranking applicants by neighborhood rather than need.



Wealth-biasing

Ranking donors or clients on patterns that track historic exclusion.



Silent disparate impact

Screening tools that quietly reproduce the outcomes you fight.

THE EQUITY SCREEN

Ask before AI touches intake or outreach

- ☐ Does this favor or exclude specific zip codes?
- ☐ Does it rank people on demographic patterns?
- ☐ Is the decision explainable to the person it affects?
- ☐ Does the language preserve their dignity?
- ☐ Have we tested it against real cases for disparate impact?

Governing AI well is fair-housing work. These are the same patterns your members already fight in lending, appraisal, and zoning.

FROM FRAMEWORK TO PLAN

You have the mindset. Now we build.

The next twenty minutes turn the Head Chef Rule and the Mission Filter into an eight-week plan your organization can actually run.



Image generated with AI (ChatGPT)

The 8-Week Governance Blueprint

From ad-hoc, ungoverned AI use to a formalized, mission-aligned policy — in eight weeks, not eight months.

WEEKS 1–2



Discovery & Alignment

Form the team. Audit what is already running. Name your limits.

WEEKS 3–5



Drafting the Guardrails

Build the three-tier acceptable use policy. Name your reviewers.

WEEKS 6–7



Pilot & Board Approval

Two-week beta in one department. Board briefing for formal adoption.

WEEK 8+



Launch & Training

Roll out as empowerment, not restriction. Set a 90-day review.



Every phase has a matching template in your toolkit — you leave with the tools, not just the concept.

Discovery, Audit, and Guardrails

WEEKS 1–2

Discovery & Alignment

- Form a cross-functional team across leadership and programs
- Survey staff on the tools already in use
- Define your non-negotiables in writing

WEEKS 3–5

Drafting the Guardrails

- Build a three-tier acceptable use policy
- Name reviewers by role in the policy, by name in practice
- Share the draft with your liability carrier

The three-tier acceptable use policy

GREEN

Approved

Summarizing public meeting notes, drafting internal agendas.

YELLOW

Supervisor sign-off

Grant narratives, board memos, donor and tenant communications.

RED

Prohibited

Client intake records, HMIS data, case files in any public tool. Eligibility, allocation, or waitlist decisions made by AI.

The Traffic-Light Vendor Scorecard

Run every AI-enabled contract through this before you sign — HMIS add-ons, donor CRMs, intake chatbots.

GO

Safe to use

- Your data stays yours
- Audit rights confirmed in writing
- Written exit and data-export plan

CAUTION

Use with controls

- Partial protections in place
- Requires enhanced human oversight
- Document your safeguards

STOP

Do not use

- Data trains public models
- No audit rights
- No exit or extraction plan



The Red-Face Test: “If this tool leaks client data tomorrow, can I look my board in the eye?”

Start at the front door: every new tool request begins with the AI Tool Request Form in your toolkit.

Pilot, Board Approval, and Launch

WEEKS 6–7



Pilot & Board Approval

Run a two-week beta in one department and note the friction points. Score any tools in the pilot. Bring the policy to your board framed as protecting the mission — not restricting staff.

WEEK 8+



Launch & Training

Roll out organization-wide as an empowerment tool. Publish your AI Use Statement. Put a 90-day review on the calendar so the policy stays current as the tools change.

BY WEEK 8 YOU SHOULD HAVE



A signed AI use policy



A named human review team



A board that approved it

How to Talk About AI With Your Board

Frame it as protection, not experimentation. Three lines that work in a boardroom.

1



“We are not adopting AI. We are governing the AI already in use.”

2



“This protects our clients, our staff, and the organization.”

3



“This shows funders we govern AI the way we govern our finances.”

Boards approve protection. They hesitate on restriction.

Call it a mission-protection strategy, not a technology project, and bring the one-page Board Brief from your toolkit.

The Funder Trust Gap

Funders — including state and federal programs — are starting to screen applications with AI before a human reads them.

1



Can you prove your impact data is human-verified?

2



Do you have a written policy governing AI use?

3



If something goes wrong, who is accountable?

Don't wait to be asked.

A documented governance framework signals operational maturity — it turns compliance homework into a competitive fundraising advantage. Make it part of your standard grant package.

Your Three Funder-Ready Artifacts

All three are templates in your toolkit — fill them in and they become part of your standard grant package.



AI Use Statement

A short public paragraph for your website, annual report, and applications.

"AI assists. Humans author."



Provenance Log

A running record of which tool touched what data, verified by whom.

Your paper trail when a funder asks.



Board Brief

A one-page memo securing formal authorization and fiduciary oversight.

Signals governance, not experimentation.

Together these three turn defensive anxiety into an offensive strategy — proof you governed the risk first.

Your First Monday

THIS WEEK



Identify the AI tools already active in your organization.



Draft one sentence of your AI Use Statement.



Name your human-in-the-loop reviewer.



Your 8-week goal: a documented governance framework ready for grant proposals and your board.

**“You aren't asking
for permission to
experiment. You're
demonstrating
you've already
governed the risk.
That is leadership.”**

**Your organization doesn't need to
be perfect. It needs to be governed.**

DISCUSSION

Questions & Conversation



What process in your organization feels most burdened by digital debt right now?



Where could a governed AI pilot create leverage — without increasing risk?

STAY IN TOUCH

Steven J. Casey

Principal, Kindred Impact LLC

steve@kindredimpactllc.com

kindredimpactllc.com

773.960.8242

Ask about the full two-day “AI for Impact” executive workshop for your board and leadership team.

Thank you to Housing Action Illinois and the 2026 Housing Matters Conference.

CREDITS

Sources & Acknowledgments

The frameworks in this session were developed by Kindred Impact LLC for the “AI for Impact” workshop series. Several concepts build on publicly available frameworks from the organizations below.

PRIMARY FRAMEWORK

Kindred Impact LLC (Steven J. Casey)

Head Chef / Line Chef model · Human-in-the-Loop Mission Filter · Shadow Kitchen · Traffic-Light Vendor Scorecard · 8-Week Governance Blueprint · AI Use Statement · Board Brief · Pocket Decision Guide

COMPANION RESOURCE

ANB Advisory Group & NTEN

“AI Policy Template” (September 2024) by Afua Bruce and Rose Afriyie. Data-sensitivity tiering, overarching AI principles, and general-use guidelines draw on this template.
anbadvisory.com · nten.org

ADDITIONAL FRAMEWORKS & RESEARCH

- NIST — AI Risk Management Framework (AI RMF 1.0): data provenance, transparency, privacy practices
- USDA — Framework for AI Use in Public Benefit Administration: equity and access principles
- Microsoft AI Principles · The HIPAA Journal · FrontEgg · Cloud Security Alliance

AI USE STATEMENT

AI assists. Humans author. The photographs on slides 1, 4, and 9 were generated with ChatGPT, are labeled on each slide, and do not depict real people or organizations. AI tools also assisted with slide design and editing. Steven J. Casey selected and reviewed every image and is accountable for all content in this deck.