

AN EDUCATIONAL SESSION FOR GOVERNMENT FINANCE OFFICERS

Getting Started with AI

A Practical Foundation for Government Finance Officers

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Three things in 50 minutes, discussion included

Educational and practical. No hype, and candor about limits throughout.

1

Foundations

What AI is and what actually changed

2

Use cases

Where it fits in a finance office

3

Policy

A foundational acceptable use policy

4

Discussion

Your questions and experiences

Ryan Orton leads RubinBrown's AI and Data Services practice, teaches at Berkeley and Wharton Executive Education, and has a hands-on background building AI solutions.

PART 1

AI today and why it matters for government

What the technology is, what changed, and the balance between usefulness and stewardship.



What we mean by AI, in plain English



Follows written rules

Traditional software does exactly what a person told it to do.



Learns from examples

Machine learning finds patterns in many examples and applies them to new cases.



Works with language

Generative AI reads, summarizes, drafts, and answers questions in ordinary language.

You work with these tools by typing plain English. No programming required.

What actually changed



Then: a specialist project

- Data scientists and a budget line
- Months of setup for one narrow task
- Owned and run by a technical team



Now: a general purpose tool

- Any staff member, in a browser
- Plain English in, drafts out
- Arrives with or without a plan

The technology now reaches your office ahead of policy, through personal accounts and through AI features vendors add to software you already own.

Where you will meet these tools



Chat assistants

- ChatGPT, Microsoft Copilot, Google Gemini, and Claude
- Reached through a browser; plain English in and out



Inside software you already own

- ERP, audit, budgeting, and office suites are adding AI features
- Often arriving through routine updates, not a purchase



Personal accounts

- Some staff are already using free tools on their own
- A policy meets that reality; silence does not

What these tools do well today



Summarize

Long contracts, packets, and regulations, condensed quickly.



Draft

First versions of routine correspondence and narratives.



Extract

Key data pulled from invoices, contracts, and grant agreements.



Explain plainly

Technical material rewritten for residents and boards.

A capable, fast assistant. Every output is a draft for your review.

A simple pattern for working with them



Give context

Paste the relevant text or background. It only knows what you provide.



Be specific

Name the audience, the format, and the length you want.



Iterate

Treat the first answer as a draft and ask for changes.



Verify

Check names, numbers, dates, and citations before relying on them.

Plain English in, a reviewable draft out. No programming involved.

What they get wrong, and why it matters here



Confident errors

Invented citations, wrong dates, and wrong numbers, delivered with confidence.



No local knowledge

It knows nothing about your entity, funds, or policies unless you provide it.



No judgment, no accountability

Both remain with you. The tool proposes; your people decide.



Data may not stay yours

Free consumer tools may keep what you type.

Treat every output like the work of a fast, confident new hire: reviewed every time.

Why this matters for government finance



The pressure

- Vacancies, retirements, and hard to fill positions
- Flat budgets and rising service expectations
- A document and compliance load that keeps growing



The standard

- Public funds and public trust
- Open records, retention, and privacy obligations
- Procurement rules and audit scrutiny

Start small, in writing, with rules, in the open.

PART 2

Practical use cases for government finance

Five grounded use cases, the pattern behind them, and one rule about data.



Where AI fits in a finance office

1

**Language heavy or
document heavy**

That is where the tools are
strongest today.

2

**High volume and
repetitive**

So the time savings are real.

3

Reviewed by a person

Before anything is relied on
or leaves the office.

Use this pattern to evaluate any use case a vendor ever pitches you.

Accounts payable



The task

- Invoices arrive in every format
- Keying, matching, coding, and exceptions
- Routine vendor questions

How AI helps

- Extracts invoice data and suggests coding
- Supports matching; flags possible duplicates and price variances
- Drafts routine vendor replies

What your people own

- Approval and release of payment
- Every vendor master change
- Judgment on every exception

The realistic view

- Comes through AP or ERP products: plan procurement, setup, and integration
- Extraction accuracy varies with document quality
- Benefits are hours returned and fewer keying errors



Document summarization

The task

- Contracts and grant agreements
- Board and council packets
- New regulations and long staff reports

How AI helps

- Fast, readable summaries and version comparisons
- Key terms: dates, amounts, obligations
- Plain language rewrites for memos

What your people own

- Verify anything you rely on against the source
- All interpretation

The realistic view

- Lowest barrier and fastest payoff, in approved general purpose tools
- Non public documents only in approved tools

What this looks like in practice

1

You provide

A 40 page grant agreement plus a specific ask.

2

It returns

Key dates, amounts, and obligations in a one page table.

3

You verify

Spot check every item against the source document.

Minutes to a reviewable draft. Review is the step you never skip.



Budget narratives and staff reports

The task

- Budget book narratives and transmittal letters
- Council and board memos
- Explaining variances in plain language

How AI helps

- Drafts narratives from your numbers and notes
- Turns technical detail into resident friendly language
- Keeps tone and format consistent across sections

What your people own

- Every number, and the final story
- Alignment with what leadership wants to say

The realistic view

- Works today in approved general purpose tools
- Improves when you provide prior year examples



Audit preparation

The task

- Request lists and gathering support
- Tying schedules and writing narratives
- Responses on a deadline

How AI helps

- Indexes support and flags gaps
- Drafts narratives from your notes
- Drafts responses and tracks prior findings

What your people own

- Accuracy of every number and statement
- Every representation to the audit team
- Knowledgeable review before anything goes out

The realistic view

- Real relief in the busy season
- Expect your auditors to ask about your AI use
- A written policy is good audit posture



Anomaly detection

The task

- Duplicate payments and unusual transactions
- Purchasing card misuse
- Outliers that sampling misses

How AI helps

- Scores transactions for unusualness
- Catches near duplicates across vendors and invoices
- Surfaces outliers by vendor, account, or season

What your people own

- Investigation of every flag
- Expect false positives; budget the follow up time

The realistic view

- A supplement to internal controls, never a replacement
- The heaviest data lift of the five; usually via audit analytics or ERP tools
- Real value, later stage

What makes a good first use case

1

High volume

So the savings are real

2

Document heavy

Language work is the strength

3

Low consequence

First drafts will be imperfect

4

Review built in

A natural check already exists

5

Permitted data

Cleared for the approved tool

A mistake caught in review should cost minutes, not a headline.

The data rule



Never enter sensitive, confidential, or personally identifiable information, or any non public record, into a tool your entity has not reviewed and approved.

Approved accounts only

Work content never goes through personal accounts.

Assume nothing is private

Consumer tools may keep what you type.

Records rules may apply

Prompts and outputs may be public records with retention obligations.

When in doubt, leave it out and ask. Bring your records officer in early.

PART 3

Building a foundational acceptable use policy

3

What belongs in the policy, and the recognized frameworks it should come from.

Why the policy comes first

Informal use is already happening, approved or not.



Protects your staff

Clear rules replace guesswork.



Protects the entity

Records, privacy, security, and procurement.



Answers the question early

Your board, auditors, or a reporter will ask how AI is governed.



Speeds adoption

A green light with guardrails beats silence.

You are not starting from a blank page



NIST AI Risk Management Framework

The national voluntary standard: govern, map, measure, and manage, plus a generative AI profile.



GovAI Coalition templates

Free policy, incident response, and vendor templates built by public agencies and aligned to NIST.



GAO accountability framework

How auditors think about AI: governance, data, performance, and monitoring.



GFOA guidance

Member guidance on AI readiness and on balancing innovation with risk.



Your state's law

Moving fast. Colorado replaced its 2024 AI law this spring; the new framework takes effect January 1, 2027.

Anchor on the stable national frameworks. Have counsel track your state.

Colorado, specifically



The 2024 law was replaced

SB 26-189, signed May 14, 2026, repealed and replaced the 2024 Colorado AI Act.



The new framework starts January 1, 2027

Narrower and disclosure based, focused on automated decisions that affect consumers.



Government services are in scope

Covered domains include government services, employment, housing, and financial services.



CORA applies today

Prompts and outputs about public business can be public records with retention obligations.



The practical move

Anchor on national frameworks now; have counsel track Colorado guidance into 2027.

None of this is legal advice. It is a reason to keep counsel close.

Scope and information



Purpose and scope

- Who is covered, including contractors
- AI features inside software you already own



Uses and tools

- A short approved tool list and encouraged uses
- Bright line prohibitions; approved accounts only



Data, privacy, and records

- Rules tied to your classifications; at minimum, public versus non public
- Retention of prompts and outputs; vendor terms on data use

People and quality



Human oversight

- A named owner for each use; review before anything is relied on
- No fully automated decisions on consequential matters



Accuracy

- The user owns the output
- Verify facts, numbers, and citations against sources



Transparency

- Disclose AI assistance where it matters, such as public facing documents
- Log significant uses



Fairness

- These systems can reflect bias
- Extra care and testing wherever people are affected

Security and upkeep



Security

- Approved platforms and access controls; never enter credentials
- Report incidents



Procurement and vendors

- AI questions in solicitations; terms on data use, training, retention, and deletion
- Notice of added AI features



Training

- Baseline before use; role specific where needed
- Refreshed as tools change



Roles and ownership

- Who approves tools, who owns the policy, where questions go



Monitoring and review

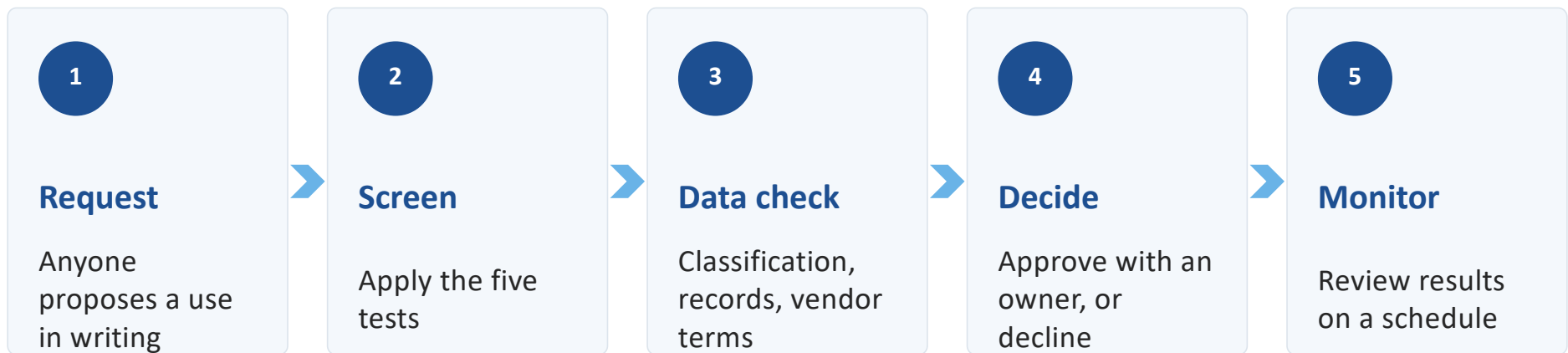
- Compliance checks and incident handling; review at least annually

How this maps to recognized frameworks

NIST function	What it covers in your policy
Govern	Purpose and scope; roles and ownership; training; monitoring and review; procurement
Map	Use case approval; approved tools; identifying consequential uses
Measure	Accuracy and verification; fairness testing; performance checks
Manage	Human oversight; incident response; corrective action

Also aligned with GAO's accountability principles: governance, data, performance, and monitoring.

A simple approval path for new uses



Lightweight on purpose. A one page intake form is enough.

Keep it foundational

- ✓ A few readable pages beat a binder nobody opens
- ✓ Adopt through your normal process; review on a schedule
- ✓ Scale to your entity: an owner group of two people plus counsel is enough
- ✓ Involve counsel, your records officer, and IT security before adoption

A starting point.

Not legal advice.

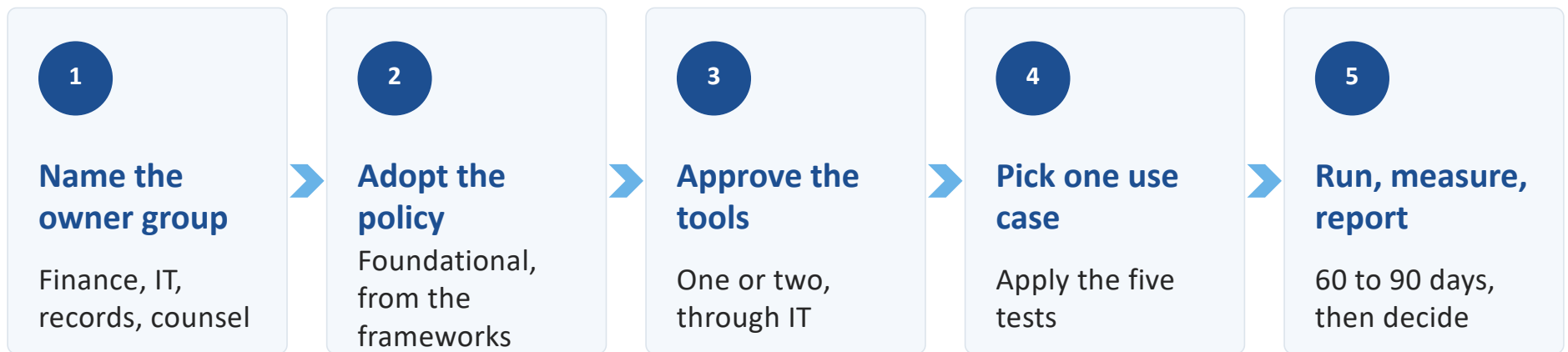
PART 4

Getting started and discussion

A five step path, and then the floor is yours.



A practical way to get started



The goal this year: a governed, useful start you can explain in a public meeting.

Your first 90 days

1

Days 1 to 30

Name the owner group and adopt the foundational policy.

2

Days 31 to 60

Approve one or two tools and train the first users.

3

Days 61 to 90

Run one use case, measure the hours, and report back.

Small, visible, and finished beats big and stalled.

Questions your board may ask



Is staff using AI right now?

- Probably yes, informally; the policy brings it into the open
- That is the strongest argument for acting now



What does this cost?

- Foundational governance costs time more than money
- Paid tools can start with a handful of licenses



Is our data safe?

- Approved tools only, and non public data stays out of the rest
- The data rule is the heart of the policy



How will we know it works?

- One pilot, measured in hours returned and errors caught
- Reported back in a public meeting

Where to go for more



NIST AI Risk Management Framework

The anchor standard, free from NIST, with a companion generative AI profile.



GovAI Coalition templates

Policy, incident response, and vendor language written by public agencies.



GAO accountability framework

A preview of how auditors will look at your AI use.



GFOA guidance

Member resources on AI readiness for finance officers.



Your peers in this room

Colleagues who have started; ask what worked and what they would redo.

Start from the templates and adapt. Do not draft from scratch.

Discussion

- Which use case would you try first, and why?
- What AI use is already happening informally in your office?
- What would your board or council ask you first?
- Who owns this in your organization today, and who should?

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Thank you.