

CASE STUDY

Midlands Housing Alliance

Organization Category: Housing

Annual Revenue: ~\$5 million

Full-time Employees: 31

Website: transitionssc.org



Columbia, South Carolina-based Midlands Housing Alliance (MHA) works to move people experiencing homelessness into permanent housing. Its homeless recovery center, Transitions, deploys a continuum of housing strategies to stabilize individuals living on the street, connect them to supportive services, increase their income, and secure lasting housing.

PAIN POINT

Case managers at Transitions conduct intake interviews that form the foundation of each client's housing and services plan. In the past, staff took handwritten or typed notes during interviews, then spent hours digitizing records, populating intake forms, and identifying next steps and relevant community resources. With 10 case managers each absorbing an estimated three hours per week in documentation tasks, MHA was investing roughly 1,560 staff hours annually in administrative work that pulled directly from time to counsel clients and navigate them toward housing stability. Unstructured notes also proved difficult to mine for patterns, limiting the organization's ability to use its own data as a strategic asset for improving case management over time.

AI TRANSFORMATION

MHA designed a three-phase AI implementation built with Google Drive, Otter.ai, and ChatGPT. Internal expertise anchored the platform choice alongside MHA's existing use of Google Drive and Sheets and the suite's alignment with HIPAA-compliant data management practices.

In Phase 1, intake interviews conducted via Google Meet are automatically transcribed using Otter.ai, replacing manual note-taking with consistent, structured text. In Phase 2, staff use generative AI prompts within ChatGPT to extract content from those transcripts to auto-populate the organizational intake form, summarize critical issues and recommend next steps for the case manager, identifying relevant community resources tailored to each client's situation. Both phases have been piloted with real intake transcripts and results reviewed across the team; early sentiment

is strongly positive. A third phase, currently in design, would formalize these workflows into an agent or chatbot capable of dynamically identifying client challenges and making real-time supportive recommendations.

MHA also developed a comprehensive policy governing the responsible use of AI tools. It establishes procurement and approval requirements, data privacy and security standards, bias reduction protocols, and mandatory staff training, with specific safeguards for client data subject to HUD and HIPAA requirements.

“ The AI initiative has already created significant efficiencies across the organization, saving case managers time on weekly documentation, transforming the grant-writing process, and allowing staff to better connect clients with appropriate community resources ”

— Monica Haddock, Vice President of Operations, Midlands Housing Alliance

AI BENEFITS

AI-supported transcription and documentation is projected to recover approximately 156 hours of staff time per case manager each year. Across MHA's 10-person case management team at an average hourly rate of \$19.23, which translates to an estimated \$30,000 in recaptured capacity each year. That recovered time flows directly into what the staff does best: face-to-face client engagement, housing navigation, and connection to benefits and services.

The organization's shift to structured, AI-generated documentation now strengthens the quality and consistency of client records. Case managers enter meetings with pre-synthesized intake summaries that allow them to address urgent needs rather than spending appointment time on background collection. Standardized records reduce missed details and repeated assessments, supporting stronger continuity of care and earlier identification of obstacles. Reliable documentation further positions MHA to demonstrate measurable outcomes to funders: strengthening grant renewals and supporting performance-based funding models that show how the organization is increasing client impact without increasing costs.

CASE STUDY

E4 Youth

Organization Category: Youth Development / Workforce Development

Full-time Employees: 7.5

Website: e4youth.org



E4 Youth is an Austin, Texas-based nonprofit working at the intersection of culture, creativity, and workforce development to connect generations and expand opportunity through storytelling. Using its Four E's framework – Engage, Educate, Empower, and Elevate – E4 Youth guides young people from initial program participation to visible community and career leadership roles, creating a self-reinforcing ecosystem in which graduates return as mentors and facilitators. E4 Youth serves hundreds of young people annually across K-through-college programs.

PAIN POINT

E4 Youth's small but growing team faced a compounding institutional knowledge problem. Meeting notes were taken manually and stored in individual Google Docs or local files with no shared retrieval system. Locating prior conversations required staff to search through emails, Slack messages, and personal memory, a process that consumed anywhere from 10 to 60 minutes per query. Student program data was similarly scattered across isolated Google Classroom assignments, with no centralized view of portfolio progress, attendance, or program health. Reporting to funders required manually assembling information from scattered sources. As the organization expanded into new schools and its first brick-and-mortar space, the gap between what the mission required – real-time visibility into youth outcomes across all programs – and what the team could actually deliver kept widening.

AI TRANSFORMATION

E4 Youth built a two-part AI infrastructure. For organizational knowledge, the team selected Fathom for meeting transcription, Notion as its database and knowledge management hub, and Zapier to automate the pipeline connecting the two, with a ChatGPT Team Workspace used to develop and refine custom prompts that format transcript outputs into structured summary tables with task assignments and owners. Every meeting is now recorded, transcribed, and routed automatically into a searchable Notion database. Staff across the organization, including senior leadership, query Notion AI in plain language to retrieve meeting decisions, generate attendance tables, and extract

action items without any manual file searching. The team adopted a summary-only sharing approach in Notion to address privacy concerns about full transcripts.

To track program data, Claude Code and Replit helped prototype a student data dashboard in 30 minutes. The dashboard, pulling from a validated Google Sheets schema organized around the Four E's framework, is designed to provide real-time visibility into the pipeline funnel, skills matrix, and badge readiness across programs. The dashboard is designed to support digital badging and micro-credentialing verified by industry professionals.

“ E4 Youth's participation in the AIOA has been a game-changer for our organizational efficiency and workflows. From developing high-impact funding intelligence tools, to automating note-taking and task tracking, to streamlining program data management, we've been able to put AI to work in practical ways that strengthen both our day-to-day operations and our long-term capacity. ”

—Carl Settles, Founder & CEO, E4Youth

AI BENEFITS

The clearest shift at E4 Youth is where institutional knowledge now lives. What once required up to an hour of searching through emails and personal memory is now easily searchable within Notion within seconds. At conservative estimates, that adds up to roughly 208 staff hours per year, valued at approximately \$13,500. Staff members now use AI as a routine part of work. Building the student data dashboard using AI coding tools rather than manual configuration or hiring a developer saved an estimated 50 hours of development time. E4 Youth can now demonstrate program impact to funders with structured, queryable data across all programs, giving the organization the infrastructure to show, not just tell, the story of what its young people are achieving.

CASE STUDY

CaringWorks, Inc.

Organization Category: Housing, Residential Treatment & Behavioral Health

Annual Revenue: ~\$10.7 million

Full-time Employees: 42

Website: caringworksinc.org



Atlanta, Georgia-based CaringWorks, Inc., is a nonprofit dedicated to reducing homelessness and empowering marginalized individuals through access to housing and services that foster dignity, self-sufficiency, and well-being. The organization delivers permanent supportive housing, outpatient behavioral health services, and residential treatment – all tailored to individuals experiencing chronic homelessness, each of whom carries at least one disabling condition. CaringWorks has served more than 10,000 clients and maintains a housing retention rate of more than 90 percent year after year. Upward of 80 percent of clients are Black, more than 35 percent are women, and more than 15 percent are under age 18.

PAIN POINT

CaringWorks' quality assurance (QA) and operations functions had significant reporting and compliance responsibilities, and a shrinking team to handle them. A staff of three had been reduced to one, who managed all performance reporting alone. Quarterly and annual dashboards required manually extracting demographic data like race, age, gender, special populations, and program enrollment from two siloed systems – ClientTrack and CareLogic – neither of which integrated with external tools. Totals were calculated by hand, columns filtered in Excel, and board-ready reports assembled from scratch. A single reporting cycle consumed up to three days of concentrated work.

Document creation presented a parallel burden. With no development director and a lean operations team, staff drafted relocation notices, standard operating procedures, policies, compliance summaries, and grant reports without support. Preparing for multiple annual monitoring visits required hunting through 24 years of data across Google Drive files, many owned by former staff members, to locate current versions of audit documents. Searching for a single record could involve reading through years of email threads across former employees' accounts.

AI TRANSFORMATION

Because CaringWorks operated in Google Workspace, it adopted Google Gemini as its primary AI platform for its ability to share custom Gems across the organization without additional licensing costs. The team built four purpose-specific Gems. The Impact Analyst Gem accepts exported ClientTrack spreadsheets and produces visualizations, demographic analyses, and board-ready narrative summaries. The Operations Manager Gem supports client relocation procedures, move-readiness checklists, relocation notices (including date calculations), and standard operating procedures. A Data Analyst Gem, designed to support the CEO in producing grant reports and demographic breakdowns for funders, is currently in development. A Prompt Coach Gem enables any staff member to create and refine their own Gems, distributing AI capability across the organization.

“The most valuable part of the initiative was having the opportunity to explore options that will benefit our agency and obtain a better understanding of where the gaps are in our processes and systems. Additionally, we were able to incorporate the assistance of two of our tech-based Board members in the process, expanding leadership involvement in AI capacity building.”

— Stephanie Burkes, Chief Program Officer, CaringWorks, Inc.

AI BENEFITS

The most immediate impact has been on data reporting and analysis. Dashboard work that previously took up to three days of manual calculation, data extraction, and narrative assembly now takes under two minutes for initial analysis, with the Impact Analyst Gem handling analysis and visualization directly from exported spreadsheets. Staff then review and customize the output before it goes to the board.

Document drafting has also become faster and more consistent. The Operations Manager Gem has cut individual document drafting time from roughly 30 minutes to 15 minutes per item and ensures that compliance documents now reference specific statutes and regulations that staff may not have recalled independently.

Beyond dashboard and document work, staff report reclaiming time from tasks that fall outside their core responsibilities. The Operations Manager saves an estimated four hours per week using AI for routine drafting and formatting tasks, while the QA Manager — who carries a heavier reporting load — saves approximately 5.5 hours per week. Combined, the two staff members redirect roughly 9.5 hours per week from administrative work to higher-value activities.

Audit preparation is faster and more thorough, with staff reporting saving hours gathering documentation ahead of audits, with less back-and-forth required. The organization estimates a roughly 20 percent reduction in time per audit cycle — across approximately 10 audits annually—translating to an estimated 10 to 20 hours of staff time saved per year, with additional reductions in auditor follow-up expected as documentation quality improves. AI-assisted document drafting ensures policies reference specific statutes and regulations, reducing the risk of compliance gaps. Compliance documents now readily incorporate regulatory language staff may not have recalled on their own, improving both accuracy and confidence.

The broader shift is structural: By distributing AI capability through the Prompt Coach Gem, CaringWorks is building an organization where any staff member can create and adapt tools, not one where AI knowledge sits with a single person.

CASE STUDY

Girl, Get Up Society

Organization Category: Mental Health & Wellness

Annual Revenue: ~\$82,000

Full-time Employees: <1

Website: girlgetupsociety.org



Girl, Get Up Society is a South Carolina-based nonprofit dedicated to helping women and girls ages 13 and older to access the therapy, self-care, and support they need to manage mental health conditions and navigate challenging life situations. The organization connects clients with therapists who understand the cultural context of their experiences, providing a space where they can be seen and supported.

PAIN POINT

Founder and executive director Rhonda Bush managed the entire process of matching individuals with therapists through a time-consuming, multistep process that often had her working on weekends. She initially tried Calendly, but users were not consistently completing forms, stalling intake. Phone-based intake was also challenging, as potential clients didn't recognize the Girl, Get Up Society phone number and didn't answer calls. These service inefficiencies meant, by the organization's estimate, that just 20 to 30 percent of women and girls seeking support were able to access therapy.

AI TRANSFORMATION

Girl, Get Up Society adopted JotForm for its HIPAA-compliant features and easy integration with other programs the organization already used, like Outlook and Google Sheets. Jotform's AI-enhanced capabilities, including video upload and automated text notifications, allowed the team to rebuild the intake process, dramatically reducing a 10-step manual workflow to a three-step automated system. Staff review and approve before any match is finalized, keeping human judgment central to the matching process.

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The AI Opportunity Accelerator gave our grassroots organization the tools, knowledge, and capacity to work smarter, strengthen our systems, and ultimately connect more women to the mental health support they need.

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— Rhonda Bush, Founder & Executive Director, Girl Get Up Society

AI BENEFITS

Through the use of AI, Girl, Get Up Society realized strong, measurable impacts with quantified efficiency gains. Intake for 10 to 20 people, which once took four hours a week, now takes approximately 30 minutes, representing an 88 percent time reduction. More importantly, the simplified workflow has increased the potential for therapy participation: AI-facilitated matching allows clients to choose their own clinicians, a shift that supports autonomy and better therapeutic fit. Staff capacity freed from intake administration can be reallocated to other areas, helping Girl, Get Up Society make sure that more women and girls who need support can actually get it.



CASE STUDY

San Francisco Community Land Trust

Organization Category: Community

Land Trust / Affordable Housing

Annual Revenue: ~\$2.5 million

Full-time Employees: 14

Website: sfclt.org



San Francisco Community Land Trust (SFCLT) is a majority women- and BIPOC-led nonprofit that has worked since 2003 to keep housing permanently affordable in San Francisco. By acquiring buildings and removing them from the speculative market, SFCLT ensures that people of color, artists, educators, service workers, seniors, and families can stay in the city they call home. Its work helped inspire and shape San Francisco's Small Sites Program – the first of its kind in the country – which has placed hundreds of homes into community ownership.

PAIN POINT

Managing a growing real estate portfolio meant that SFCLT's asset management team had to track compliance requirements, financial obligations, and operational deadlines across dozens of properties without the enterprise-grade tools typically available to large developers. Staff manually opened individual loan agreements and scanned hundreds of pages to locate specific clauses, maturity dates, reserve requirements, or covenant thresholds. Each verification required re-reading documents, cross-checking handwritten notes or spreadsheets, and relying on institutional memory that could differ from person to person. This process was slow, inconsistent, and exposed SFCLT to missed deadlines, compliance risk, and a portfolio that grew harder to manage with every new acquisition.

AI TRANSFORMATION

Rather than purchasing a new platform, SFCLT leveraged an existing ChatGPT Pro license to keep costs low. The team built a custom GPT for internal asset management, uploading SFCLT's full library of legal and loan documents – hundreds of pages of agreements, compliance records, and financial obligations. The system indexes all documents and allows

staff to query them in plain language: asking a question like “What is the reserve requirement on this loan?” returns the exact clause and page reference in seconds. Key terms are extracted into structured fields and monitored

continuously, so verification becomes a quick confirmation rather than a full document review. Notion was integrated as a centralized knowledge hub for standard operating procedures and workflows. The custom GPT has been in active use by approximately three staff members on the asset management team for over four months, with plans to tailor additional GPTs for other departments as their specific use cases are identified.

“ This AI capacity-building initiative was extremely helpful in introducing us to different AI tools and ways to address our internal capacity and administrative challenges, which are common across CLTs and other housing organizations. We really enjoyed the group sessions and our fabulous AI coach. We are also grateful to have developed a full and robust AI policy, including thinking through which tools SFCLT will use from an ethical and privacy standpoint. Thank you for getting us going! ”

— Sarah Scruggs, Program Director, SFCLT

AI BENEFITS

The numbers show the difference. A question that previously took SFCLT staff from five to 10 minutes to answer through manual document review now takes approximately 30 seconds — up to a 95 percent reduction in time per task. With the asset management team fielding roughly three of these inquiries per person per day, SFCLT estimates savings of close to 100 hours annually. Beyond efficiency, the system has also reduced the risk of lender non-compliance and enables the team to respond to tenant questions about leases and loan terms immediately. And perhaps less quantifiable but no less real: The team described the shift as “energizing,” a sense that they were finally getting the support and capacity they had long needed. SFCLT can now scale its real estate portfolio without a proportional increase in staffing burden, making community ownership of housing more sustainable over time.

In the months since the Accelerator, SFCLT has moved from OpenAI's ChatGPT to Claude.



CASE STUDY

Atlanta Legal Aid

Organization Category: Legal Services / Civil Legal Aid

Annual Revenue: ~\$15.5 million

Full-time Employees: 140

Website: atlantalegalaid.org



Atlanta Legal Aid provides free civil legal assistance to help people in need in the metro Atlanta area access justice to protect their rights and secure their safety and stability. It is one of the largest legal aid organizations in the region.

PAIN POINT

Maintaining compliance through correct file documentation required extensive effort by Atlanta Legal Aid and its administrative staff. The process historically involved a labor-intensive review of client records – assessing compliance based on case type, communicating with program staff, and reaching out to clients to collect any missing documentation. Once a year, the administrative team conducted a comprehensive audit to ensure all required details were included across files. The timing was particularly problematic: Contacting clients about paperwork long after their cases were resolved was disruptive and sometimes impossible, and gaps in documentation created a real risk of funding loss.

AI TRANSFORMATION

Atlanta Legal Aid already used Google Workspace, which made Gemini the natural choice, selected for cost, ease of use, and integration with Legal Server, the organization's case management system. AI tools now automatically inspect every relevant closed case for compliance issues. Any time the system identifies a gap, it adds a compliance flag in the source system and emails the relevant caseworkers immediately, so they can request missing documentation during the natural course of their ongoing attorney-client relationship, rather than months after a case closes.

“ [AI] shifted our compliance process from chasing missing paperwork months after a case closed to fixing gaps instantly. We've reclaimed hundreds of staff hours and redirected that energy right back into serving our community.”

— Shannon M. Knox, Director of Information Technology, Atlanta Legal Aid

AI BENEFITS

Atlanta Legal Aid now spends significantly less time on its lengthy year-end compliance check. Unit managers receive automated notifications for compliance issues as they arise rather than having to hunt for them manually or follow up with clients long after closing a case. The transition to automated auditing is reported to be 60 to 80 percent more cost-effective than the previous manual process. The number of out-of-compliance cases has dropped significantly too (reducing funding loss noncompliance can trigger). Staffing hours dedicated to compliance have also shrunk, allowing the same number of attorneys to do more valuable casework and serve more clients.



CASE STUDY

Eviction Defense Collaborative

Organization Category: Legal Services / Tenant Rights

Annual Revenue: ~\$16.5 million

Full-time Employees: ~100

Website: evictiondefense.org



San Francisco-based Eviction Defense Collaborative (EDC) is the city's principal organization fighting on behalf of low-income tenants facing eviction. As the lead agency for San Francisco's Tenant Right to Counsel program, EDC provides free legal representation, rental assistance, and social services to more than 5,000 residents each year. Its integrated model combines direct legal services with crisis intervention, housing support, and long-term rental subsidies for seniors and people with disabilities, reflecting a deeply held belief that housing is a basic human right.

PAIN POINT

EDC's Right to Counsel Clinic team faced multiple challenges supporting clients negotiating Unlawful Detainers (UD), landlord-initiated eviction processes. For every client intake, staff manually calculated each legal deadline, accounting for service method, weekends, and court-specific holidays, which senior staff then verified. In such circumstances, accuracy is essential: a missed deadline costs a tenant their right to defend themselves in court. Calculating these timelines can be complex and time-consuming. When faced with uncertainty, clinic staff frequently escalated concerns to senior staff, adding more time and steps to the process. High staff turnover further hampered intake and increased client wait times. These workflow inefficiencies meant staff spent time on administrative tasks rather than client-facing work – a high cost for an organization where legal representation increases a tenant's chance of avoiding homelessness by more than 70 percent.

AI TRANSFORMATION

EDC selected Microsoft Copilot Plus as its primary platform. To help staff respond to eviction cases, the organization built a customized agent in Copilot Studio – the UD response calculator. The calculator draws on key authoritative documents, such as state procedural laws, to help staff quickly determine timelines and key steps needed to legally respond to unlawful detainer (eviction) cases. Clinic personnel input information about the date and method of service, and the AI tool conveys deadlines with a supporting rationale for staff to verify.

“

The most valuable part of the AI capacity building initiative was learning about a wide range of AI tools available, the coaching sessions where we could experiment with them and develop a real use case for our organization, and the opportunity to learn from other nonprofits by sharing experiences and best practices

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— Helena Saito, Data Program Manager, Eviction Defense Collaborative

AI BENEFITS

The UD response calculator has improved access to case-processing support, directly strengthening EDC's ability to serve tenants facing the most time-sensitive eviction situations. Now, clinic staff enter a tenant's served date and service method into the UD response calculator, and the agent instantly returns the correct deadline with its rationale. A process that once took 24 hours per month across roughly 180 clients now takes 1.5 hours, an approximately 94 percent time reduction. Clients experience shorter waits and more consistent assistance, and staff have capacity to serve an additional 12 clients per month. Equally significant was staff members' shift from learning AI tools to feeling able to coach others on them. In an organization where staff turnover exerted real pressure, building that kind of durable, transferable capacity mattered as much as workflow improvements.

CASE STUDY

Measure

Organization Category: Research / Evaluation / Responsible Technology

Annual Revenue: ~\$1.1 million

Full-time Employees: 6

Website: wemeasure.org



Measure is a Texas-based nonprofit headquartered in Austin with a growing national and global presence. Measure mobilizes communities to transform lived experience into data, data into power, and power into systemic change. Working with nonprofits, funders, public agencies, researchers, and communities directly, Measure provides equitable evaluation, training and advocacy, and responsible AI governance, ensuring that the people closest to the problem help shape the systems meant to serve them.

PAIN POINT

Measure's contracting and operational workflows depended on a fragmented patchwork of email threads, shared documents, spreadsheets, and individual staff follow-ups. Progress relied on institutional knowledge held by just a few staff members, creating bottlenecks and undocumented processes that were difficult to transfer or scale. Approval timelines and payment processing slowed when contract status was not consistently visible across teams. As contract volume grew, coordination took longer, errors increased, and staff capacity was increasingly diverted from mission-critical work.

AI TRANSFORMATION

Measure built an AI-enabled contracting and invoice management system by combining several platforms, each selected for a specific function. ChatGPT and Claude were used for workflow design, standard operating procedure development, policy drafting, integration research, and implementation guidance. Claude was used to develop the Full Cycle Contract Management Process and Manual, which documents the contracting lifecycle from contract design through payment tracking. Lovable, a no-code AI development platform, was used to build the Equity Pay Scale automation tool, which structures pricing and scope alignment for direct service contracts. ClickUp, Zapier, and a QuickBooks integration support invoice routing, approval tracking, automation, and real-time payment visibility across teams. The contractor invoicing and payment process – covering invoice submission, internal approvals, auto-generated QuickBooks submissions, and automated contractor notifications – has operated across three full payroll cycles.

Measure also developed a formal AI governance suite using Claude: an AI Acceptable Use Policy, AI Governance Procedures, an AI Tool Tracking Survey, and a community-facing one-pager. The organization has intentionally sequenced its AI adoption, building operational infrastructure first before advancing to more sophisticated analytical capabilities.

“ The Accelerator provided structure, resources, and a learning community that helped us build the infrastructure to operate more efficiently and direct more of our capacity toward our mission. Investments like this matter because the organizations at the table are the ones shaping services, influencing policy, and building systems that directly impact people's lives, and how they adopt AI changes how their communities are served. ”

— Jameila "Meme" Styles, Founder and President, Measure

AI BENEFITS

Contracting workflows are now centralized in a single system, giving staff real-time visibility into contract status and documentation without manual tracking or follow-up. Across the organization, the efficiency gains have been substantial. Measure has reclaimed over 800 staff hours from contracting and workflow management alone. AI-assisted grant research and applications have reduced application time from hours to minutes.

Beyond time savings, Measure has reduced annual communications costs by \$65,000. Additionally, since adopting these tools, Measure has raised approximately 50 percent of its annual fundraising goal, and staff have redirected their attention toward community-focused programming, partnership development, and research delivery. The dollar value of those reclaimed hours, an estimated \$49,000 to \$89,000 annually, brings the total quantifiable savings to approximately \$114,000 to \$154,000 annually.

Across all functions, the organization estimates a 30% or greater increase in overall staff productivity, which, for a small team, makes a huge difference in its ability to work sustainably toward its mission.

