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THE AI USE CASE DISCOVERY PLAYBOOK

Internal Notes Section

This playbook was developed as a practical outcome of the **AI for Good** program, drawing directly from the methodologies tested and refined during Workshops 1 and 2 with participating organizations. It builds on a human-centric framework that prioritizes real-world challenges tied to SDG 3 (Health & Wellbeing), guiding organizations to uncover, frame, and validate high-quality AI use cases rooted in end-beneficiary needs.

The goal is to equip teams with a structured, accessible, and replicable process to:

- Discover how AI can support their mission and impact, especially focused on **SDG3**
- Use a **human-centered** approach that puts their beneficiaries at the core
- Identify high-potential, feasible AI use cases tailored to their services
- Avoid common mistakes and access ready-to-use AI tools
- Improve internal AI literacy and readiness for future adoption

It is intended as both a learning tool and an implementation guide for **MENA-region** organizations looking to adopt AI solutions sustainably and effectively.

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Preface

Artificial Intelligence (AI) is no longer the domain of large tech firms alone. Today, community organizations, nonprofits, and social enterprises can leverage AI to improve their operations, programs, and impact - even without technical teams.

This playbook is designed as a **step-by-step guide** to help you:

- Discover where AI can meaningfully support your mission.
- Frame challenges using a **human-centered approach** rooted in your beneficiaries' real experiences.
- Design strong, AI-ready **use cases** aligned with Sustainable Development Goal 3 (Good Health & Well-Being).
- Prioritize and move quickly to small pilots, without over-investing in ideas that are unfeasible, unsafe, or misaligned.
- Access ready-to-use templates, worksheets, and AI-powered assistants that make this process easier.

Who should use this playbook:

This playbook is designed for cross-functional teams within mission-driven organizations. To get the most value, it should be used collaboratively by:

- **Program managers**, who bring insight into day-to-day operations and service delivery.
- **Beneficiary-facing staff**, who bring firsthand insight into beneficiaries' real needs and experiences.
- **Technical** or **data-focused team members**, who are familiar with your current tools, systems, and available data.
- **Decision-makers** (when possible), who can help unlock resources and alignment.

How to Use This Playbook

Work **step by step** - do not skip ahead. Each stage builds on the last.

Produce an **artifact** at every step (worksheet, persona, map, or scorecard). By the end, you will have a complete package ready to share with decision-makers.

Plan to spend **2–3 half-day workshops** or a **focused week** working through the flow with your team.

Use the included **templates** and **GPT assistants** to reduce friction and get structure.

AI: What It Is & Why It Matters

1.1 What is AI?

Artificial Intelligence (AI) refers to systems that can perform tasks that normally require human intelligence - such as recognizing patterns, understanding language, making predictions, or generating new content.

Predictive AI: Systems that use data to forecast outcomes.
Example: predicting which patients are most at risk of dropping out of a rehabilitation program.

Generative AI: Systems that create new outputs (text, images, speech, code).
Example: drafting personalized therapy exercise plans based on a patient's journey map.

AI is not magic. It relies on data, rules, and probabilities. The key is to match the right AI approach to the **right problem**.

1.2 Why AI Matters for Social Impact

- **Resource efficiency:** Automate repetitive work like scheduling or reporting.
- **Personalization:** Deliver more tailored support to each beneficiary.
- **Early alerts:** Detect problems (e.g., disengagement, risks) earlier than staff can.
- **Scale:** Extend services to more people without proportional staff increases.

Even if your organization does not have a dedicated tech team, you can still benefit from AI. Today's tools are **low-code/no-code** and can be integrated with systems you already use.

Global Standards for Health Impact

1.3 Understanding SDG 3 (Good Health & Well-Being)

The United Nations' **Sustainable Development Goal 3** aims to

"Ensure healthy lives & promote well-being for all at all ages."

Relevant **sub-targets** include:

- **3.4**: Reduce mortality from non-communicable diseases and promote mental health.
- **3.5**: Strengthen prevention and treatment of substance abuse.
- **3.8**: Achieve universal health coverage.
- **3.c**: Substantially increase health financing and workforce support.

Why align to SDG 3?

- It connects your AI use cases to a **global impact** agenda.
- It ensures that your framing is **beneficiary-first**.
- It makes your work legible to funders, partners, and evaluators.

Effective and Ethical AI

1.4 Where AI Can Help

AI applications for SDG-aligned organizations fall into three broad categories:

Internal Operations

- HR (recruitment, onboarding, staff well-being tracking).
- Donor reporting & compliance automation.
- Financial management (expense tracking, fraud alerts).

Program Delivery

- Personalized learning, therapy, or care pathways.
- Monitoring attendance, participation, or engagement.
- Feedback collection and analysis.

Beneficiary Support

- Emotional health check-ins (chatbots, journaling assistants).
- Motivational nudges to continue treatment or education.
- Early alerts for high-risk cases (dropout, relapse).

1.5 Key Principles for Responsible AI in Impact Work

- **Beneficiary First:** Always design with the end user's needs at the center.
- **Transparency:** Make it clear when beneficiaries are interacting with AI.
- **Equity & Inclusion:** Ensure AI does not exclude or burden vulnerable groups.
- **Data Ethics:** Collect and process data responsibly, with proper consent.
- **Do No Harm:** Apply a traffic-light decision gate, proceed only when risks are acceptable.

Template 1A – AI Readiness Snapshot

Purpose: Capture your current understanding of AI and where it might apply in your organization.

Prompt	Your Notes
How familiar is your team with AI? (Beginner, Intermediate, Advanced)	
What AI tools (if any) are already in use?	
What tasks in your organization feel repetitive, data-heavy, or decision-heavy?	
Which services/programs might benefit from more personalization or automation?	
Where do you think AI could save your team the most time?	
Where do you think AI could help beneficiaries directly?	

Template 1B – SDG 3 Relevance Map

Purpose: Connect your mission to SDG 3 targets early.

Challenge	How It Relates to Our Work	Possible AI Support
3.4: Reduce mortality from Non-communicable diseases (NCDs), promote mental health	Example: Mental health peer support groups	AI chatbot for mood tracking
3.5: Prevent/treat substance abuse	Example: Rehabilitation counseling service	Predictive AI to flag relapse risk
3.8: Universal health coverage	Example: Rural clinic program	Automated triage assistant
3.c: Increase workforce support	Example: Staff training program	Personalized learning AI

Instructions: Circle **1–2 SDG subgoals** most aligned with your programs. Write down how your work contributes, then brainstorm potential AI support.

Template 1C – Where AI Can Help (Brainstorm Canvas)

Purpose: Identify opportunities across the three categories.

Category	Example Opportunities	Your Ideas
Internal Operations	HR automation, financial reporting, scheduling	
Program Delivery	Personalized learning plans, monitoring engagement	
Beneficiary Support	Emotional health assistant, motivational nudges, early alerts	

Instructions: With your team, spend 10–15 minutes brainstorming ideas for each category. Use sticky notes or digital equivalents, then cluster similar ones.

Key Outputs for the Discovery Phase

By the end of this section, you should have:

- **1 Program Inventory sheet** (with clear KPI).
- **1 Stakeholder Map** (with champions and resistors identified).
- **1 Beneficiary Persona Canvas**.
- **1 Journey Map** (with stages, emotions, frictions, and data).
- **1 Pain Point Clustering Sheet** (themes prioritized).

These outputs will **feed directly** into Section 3, where we turn pain points into AI-ready challenge statements.

2.1 Why Human-Centered Matters

Most failed AI projects start with a tool in search of a problem. This playbook flips the script: we begin with the **lived experience** of your beneficiaries and organization stakeholders.

This approach can be used for any of the below categories:

Org-Level Ops (Category 1)	**Org-Level Programs** (Category 2)	**Beneficiary-Level Ideas** (Category 3)
Surface workflow gaps and inefficiencies that AI can streamline without disrupting core operations.	Identify where AI can enhance or scale existing services, grounded in real needs rather than assumptions.	Reveal high-value opportunities directly tied to beneficiary pain points, ensuring ideas are viable and adoption-ready.

By mapping programs, stakeholders, personas, and journeys, you will:

- Avoid “solution-first” traps.
- Anchor every challenge in a **real human need**.
- Expose data flows and friction points that can later impede AI feasibility.

2.2 Step 1 – Define Your Program or Service

Goal: Focus on one program at a time. AI scoping becomes unmanageable if you try to cover everything.

- Write the program's **objective** in one line.
- Define its **primary beneficiaries**.
- Note its **delivery method** (in-person, digital, hybrid).
- Identify **1 success KPI** with a baseline and a target in ≤12 months.

Template 2A – Program Inventory

Program Name	Objective	Beneficiaries	Delivery Method	**KPI** (baseline → target)
Example: Youth Rehab Counseling	Support teens in recovery	Teens 14–18 in outpatient care	Weekly group + app check-ins	Retention 60% → 80%

How to Use This Output: Once you've completed the Program Inventory, share it with your team leads and use it as your "**anchor document**" for all subsequent work. This single-page snapshot ensures everyone is aligned on scope, success measures, and who you're serving. Pin it to your project workspace or include it at the top of every meeting agenda to maintain focus and prevent scope creep.

2.3 Step 2 – Map Your Stakeholders

Goal: Understand **who matters** to the program's success and who can influence AI adoption.

Use a **Power–Interest Grid:**

- **High Power / High Interest** = Champions (keep close).
- **High Power / Low Interest** = Gatekeepers (win support).
- **Low Power / High Interest** = Allies (keep engaged).
- **Low Power / Low Interest** = Peripheral (inform occasionally).

Template 2B – Stakeholder Map

Stakeholder	Role	Power (H/M/L)	Interest (H/M/L)	Notes
Program Director	Oversees delivery	High	High	Champion
Donor Representative	Provides funding	High	Low	Needs periodic updates
Frontline Counselor	Direct service provider	Medium	High	Key ally
Beneficiary	Receives service	Low	High	Central to design

How to Use This Output: Your completed Stakeholder Map is your engagement strategy roadmap. For each quadrant:

- **Champions** (High Power/High Interest): Schedule regular check-ins; involve them in key decisions
- **Gatekeepers** (High Power/Low Interest): Provide concise updates at critical milestones; demonstrate ROI early
- **Allies** (Low Power/High Interest): Keep them informed and engaged; they're your advocates on the ground
- **Peripheral:** Send periodic summary emails; don't over-communicate

Use this map to identify who should review your challenge statements (Section 3) and who needs to approve your 7-Day Pilot Plan (Section 6).

2.4 Step 3 – Create a Beneficiary Persona

Goal: Humanize the beneficiary to make abstract challenges concrete.

Include:

Demographics (age, gender, background) | **Behaviors** (participation patterns, digital literacy) | **Needs & Motivations**
Barriers & Struggles | **Goals / Desired Outcomes**

Template 2C – Persona Canvas

Persona Name	Demographics	Needs/Motivation	Barriers/Struggles	Goals
“Lina Kiln”	24-year-old educator, lives in Abu Dhabi	Needs flexible reminders, struggles with time management, and feels overwhelmed juggling multiple apps.	Faces limited Arabic ADHD resources, a clinical-feeling app UX, and concerns about sharing mental-health data.	Wants to stay focused, inspire with empathy, and values consistency-driven tools

How to Use This Output: Print your persona and display it prominently in your workspace. When making decisions throughout this playbook - from selecting challenges to designing pilots - ask: "**Would this actually help Sara?**" Share the persona with stakeholders who may not interact directly with beneficiaries to build empathy and shared understanding. This persona should be referenced in every challenge statement you create and every solution you propose.

2.5 Step 4 – Map the Beneficiary Journey

Goal: Trace the end-to-end experience of your persona in the program.

Steps: Break down the program into 5–7 key stages. At each stage, note:

What the beneficiary does. | Tools/resources used. | Emotions experienced.
Frictions or challenges. | Data created (logs, forms, notes).

Template 2D – Journey Map

Stage	What Happens	Tools/Resources	Emotions	Pain Points	Data Generated
Intake	First counseling session	Forms, intake app	Nervous, hopeful	Forms too long, staff turnover	Intake form data
Engagement	Weekly group therapy	Group Zoom calls	Supported, anxious	Drop in attendance after 2 weeks	Attendance logs
Follow-up	Mobile check-ins	App	Lonely, demotivated	App notifications ignored	App usage logs

How to Use This Output: Your Journey Map is a **diagnostic tool** and **innovation canvas**. Review it with frontline staff to validate accuracy - they often spot gaps you've missed. Use the "Pain Points" column to identify where AI might intervene, and the "Data Generated" column to assess what's available for AI solutions. This map will directly feed into your Pain Point Clustering (Step 5) and Challenge Statement development (Section 3). Consider creating a visual version of this journey to share with donors or leadership.

2.6 Step 5 – Extract & Cluster Pain Points

Goal: Turn messy journey notes into a structured list of pains.

- Write down each pain point (one per sticky or row).
- Cluster similar ones into **themes**.
- Rank themes by frequency and intensity.

Template 2E – Pain Point Clustering Sheet

Pain Point	Category/Theme	Intensity (H/M/L)	Notes
Long intake forms discourage participation	Onboarding	High	Data entry burden
Attendance drops after 2 weeks	Engagement	High	Possibly linked to motivation or reminders
App notifications ignored	Technology	Medium	Poor UX, too generic

How to Use This Output: Your clustered pain points become your **innovation pipeline**. Prioritize 2-3 high-intensity themes that appear multiple times in the journey. These become candidates for your AI Challenge Statements in Section 3. Share this with your team in a quick 15-minute workshop: vote on which pains are most urgent and most solvable. Keep the full list - lower-priority items can be addressed in future cycles, but capturing them now prevents good ideas from being forgotten.

2.7 Outputs of Section 2

How to Use These Outputs Together: You now have a complete **Human-Centered Discovery Package**. Before moving to Section 3:

Validation Check: Review all five outputs with at least one beneficiary and one frontline staff member. Does the persona feel real? Are the pain points accurate?

01

Package & Share: Combine these into a short slide deck or one-page summary for stakeholders. This builds buy-in and ensures everyone understands the human context before discussing AI solutions.

02

Reference Throughout: These documents are living references - you'll return to them in every subsequent section. The Journey Map informs your Challenge Statements; the Stakeholder Map guides your pilot approvals; the Persona keeps you beneficiary-centered.

03

Next Step: Section 3 will help you transform your prioritized pain points into structured, AI-ready challenge statements that pass feasibility and ethics checks.

From Problem to Clarity: Defining Your AI Challenge

3.1 Why This Step Matters

It's easy to say: "AI can help with engagement." But without a clear, testable statement, the idea will collapse in later stages. This section ensures you frame the **right problem** in the **right way**.

- Keeps the **beneficiary's pain point** at the center.
- Prevents vague or overly broad challenges.
- Forces you to check **root causes**, **data**, and **constraints**.
- Produces **structured outputs** that funders, partners, or AI developers can actually use.

3.2 The Challenge Statement Format

Every AI Challenge Statement must include **five elements**:

Problem Statement	Root Causes	Desired Outcome	Constraints & Requirements	Data Availability
Plain language description of the pain point. Example: "Youth drop out of the rehab program after two weeks of attendance."	What underlying factors contribute to the problem? Example: "Notifications are generic, transportation barriers, low motivation."	What positive result do we want? Example: "Increase retention to 80% at the 4-week mark."	What limits, resources, or boundaries must be respected? Example: "Must protect patient privacy; must work on low-bandwidth mobile devices."	What data do we have (or can get)? Example: "Attendance logs, app usage metrics, weekly counselor notes."

Template 3A – Challenge Statement Worksheet

Prompt	Your Notes
Problem Statement	
Root Causes	
Desired Outcome	
Constraints & Requirements	
Data Availability	

3.3 The SMART+R Test

Before finalizing a challenge, run it through the **SMART+R filter**.

Template 3B – SMART+R Checklist

Specific	Measurable	Achievable	Relevant	Time-bound	Responsible
Is the challenge clearly defined and focused on one core issue?	Can we measure success with clear indicators or KPIs?	Is the solution realistic given current resources and capacity?	Does this challenge align with the organization's mission and SDG 3 (Health & Wellbeing)?	Can progress be seen within ≤12 months?	Is the AI solution ethical, inclusive, & privacy-compliant?
☑ Yes	☑ Yes	☑ Yes	☑ Yes	☑ Yes	☑ Yes
Notes: It targets ADHD users who drop off after two weeks due to manual tracking.	**Notes:** Progress tracked through weekly session logs and engagement rates.	**Notes:** AI tools like Copilot and Gemini can automate the tracking process easily.	**Notes:** Supports mental health and behavior improvement for adults with ADHD.	**Notes:** Interventions can be tested and iterated within one program cycle (3 months).	**Notes:** No personal data stored; model outputs reviewed for fairness.

3.4 Example Challenge Statements

Weak Example:

“AI should help us improve engagement.”

✗ Problem: Too vague. | No clear root causes, data, or KPI. | Fails SMART+R.

Strong Example:

“Youth in the rehab program disengage after 2 weeks (Problem). Root causes include generic reminders, transport barriers, and declining motivation (Root Causes). Our goal is to increase retention from 60% to 80% at the 4-week mark (Desired Outcome). Any solution must protect patient privacy, work offline, and avoid adding counselor workload (Constraints). We have attendance logs, app usage data, and counselor notes (Data).””

✓ Passes SMART+R. | Actionable and beneficiary-centered.

Finalizing Your AI Challenge Statements

3.5 Using GPT to Co-Create Challenge Statements

To speed up this step, we recommend a **Challenge Statement GPT Assistant** (Appendix 9.1).

Example Prompt:

“I am working on the [Youth Rehab Counseling] program. The persona is [Sara, 16, high school student]. Her pain point is [attendance drop after 2 weeks]. Please generate a challenge statement in the format: Problem, Root Causes, Desired Outcome, Constraints, Data Availability.”

You can then iterate:

Ask GPT to **clarify constraints**. | Ask it to suggest **metrics for outcomes**. | Ask it to **stress-test feasibility**.

3.6 Outputs of Section 3

By the end of this section, you should have:

- **1–2 high-quality** Challenge Statements per program.
- Each one validated with the **SMART+R checklist**.
- Confidence that your challenges are clear, feasible, and mission-aligned.

Aligning Your AI Use Cases with SDG 3

4.1 Why Align with SDG 3?

The United Nations Sustainable Development Goal 3 (SDG 3) is: “Ensure healthy lives and promote well-being for all at all ages.”

Aligning your AI use cases with SDG 3:

- Connect your work to a globally recognized framework.
- Strengthens your credibility with donors, partners, and governments.
- Keeps the focus beneficiary-first and impact-driven.
- Ensures solutions target real health and well-being outcomes, not just internal efficiency.

4.2 Key SDG 3 Targets for Nonprofits

Here are the most relevant sub-targets for social impact and health-focused organizations:

- **3.3**: End epidemics of communicable diseases.
- **3.4**: Reduce mortality from non-communicable diseases (NCDs) and promote mental health.
- **3.5**: Prevent and treat substance abuse.
- **3.7**: Ensure universal access to reproductive and sexual health services.
- **3.8**: Achieve universal health coverage.
- **3.c**: Substantially increase health financing and health workforce.
- **3.d**: Strengthen health systems and risk management capacity.

4.3 Example AI Use Cases per Subgoal

SDG 3 Subgoal	Example AI Use Case	How AI Helps
3.3: End epidemics	Predict disease spread in rural areas	AI models analyze clinic and mobility data to forecast outbreaks
3.4: Mental health	Personalized therapy support chatbot	Provides daily check-ins, nudges, and early alerts
3.5: Substance abuse	Predict relapse risk	Predictive AI flags disengagement patterns in youth rehab programs
3.7: Reproductive health	AI triage tool for maternal care	Automates symptom assessment and referrals
3.8: Universal health coverage	Appointment scheduling assistant	Expands access by reducing admin bottlenecks
3.c: Increase workforce support	AI-powered staff training	Personalized learning journeys for health workers
3.d: Risk management	Crisis monitoring dashboard	Uses data streams to flag emerging public health risks

4.4 Framing Impact in SDG Terms

When presenting an AI use case, shift from **program-level language** to **SDG framing**.

Program Language

"We want to improve youth rehab retention."

SDG 3 Language

"This initiative contributes to SDG 3.5: Strengthening prevention and treatment of substance abuse by using AI-powered motivational nudges and predictive alerts to increase retention among youth in recovery."

This framing:

Shows global relevance of your project. | Makes it easier to secure funding. | Creates a clear link between local action and global goals.

Template 4A – SDG 3 Alignment Map

Challenge Statement	SDG 3 Subgoal	How It Contributes	AI Angle
Improve rehab retention	3.5	Prevent substance abuse relapse	Predictive risk alerts, motivational nudges
Reduce intake dropouts	3.8	Expand universal health coverage	Automated intake and triage
Support staff training	3.c	Strengthen health workforce	AI tutor for medical training

4.5 Outputs of Section 4

By the end of this section, you will have:

A clear **map of your challenges** to SDG 3 subgoals.

Example AI contributions phrased in **global impact language**.

Reframed challenge statements that are both mission-aligned and funder-friendly.

Assessing AI Value & Feasibility

5.1 Why This Step Matters

Not every problem is right for AI. Some challenges may lack the right data, be too complex, or create ethical risks.

Others may be technically feasible but **misaligned** with your **mission or impact goals**.

This section helps you quickly answer:

- Does AI add value here?
- Do we have the right conditions for success?
- Is this challenge worth investing in further?

5.2 Quick AI Fit Checklist

Use this fast screen to test “AI fit”:

- **Repetitive? →** The task is repeated often.
- **Data-driven? →** There’s relevant, usable data.
- **Decision-heavy? →** The problem involves judgment that can be augmented by AI.
- **Personalization? →** Beneficiaries need tailored support.
- **Real-time? →** Faster responses would create value.

Template 5A – AI Fit Checklist

Question	Yes/No	Your Notes
Is the problem repetitive?		
Is it data-driven?		
Does it require many decisions?		
Does it need personalization?		
Does it benefit from real-time response?		

5.3 Feasibility Scorecard

Next, assess the strengths and risks of each challenge:

Template 5B – Feasibility Scorecard: Scoring: 1 = Very weak / high risk | 3 = Moderate / uncertain | 5 = Strong / low risk

Criteria	Definition	Score (1–5)	Notes
AI Compatibility	The degree to which the problem is suitable for an AI-based solution. AI works best for tasks that are repetitive, data-driven, require pattern recognition, need personalization, or benefit from automation.		Is AI the right approach?
Technical Feasibility	Your organization's capacity to implement and maintain the AI solution, including availability of technical skills, infrastructure, tools, and ongoing support.		Do we have tools/ skills?
Synthetic Data Feasibility	The ability to create realistic artificial data to train or test AI models when real data is limited, sensitive, or unavailable. Synthetic data mimics real data patterns without exposing actual beneficiary information.		Could we use synthetic data if real data is limited?
Regulatory & Compliance Risk	Legal, privacy, and regulatory constraints that could block or complicate implementation, including data protection laws (GDPR, local regulations), health information privacy (HIPAA equivalent), and sector-specific rules.		Any laws or rules that may be barriers?
Alignment with SDG 3 & Mission	How directly the use case advances your organization's core mission and contributes to UN Sustainable Development Goal 3 (Good Health & Well-Being) outcomes for beneficiaries.		Does it directly advance our impact goals?
Potential for Scalable Impact	The use case's ability to grow beyond an initial pilot to serve more beneficiaries, expand to other programs, or be replicated by other organizations without proportional increases in cost or complexity.		Can it grow beyond a pilot?
Equity & Inclusion	The extent to which the AI solution works fairly and effectively for all beneficiary groups, including marginalized communities, without creating new barriers or reinforcing existing biases related to language, literacy, technology access, disability, gender, or socioeconomic status.		Does it work for all groups, not just the majority?
Organizational Readiness	Your organization's preparedness to support the AI initiative, including leadership buy-in, available staff time, budget allocation, change management capacity, and cultural openness to innovation.		Are champions, resources, and staff available?

5.4 The Traffic-Light Gate

PB1 introduced the Traffic-Light Gate as a clear decision tool:

- **Green = Go →** Challenge is strong across all areas, with no critical risks.
- **Yellow = Refine →** One or two areas need work; mitigate before moving forward.
- **Red = Stop →** Major risks in data, feasibility, or ethics; do not proceed without redesign

Template 5C – Traffic-Light Gate

Area	Status (🟢/🟡/🔴)	Notes / Next Steps
Data Availability	🟡	Counselor notes need anonymization
Technical Feasibility	🟢	AI tools available
Compliance Risk	🟢	No issues flagged
Organizational Readiness	🟡	Staff training needed

5.5 Responsible AI & Ethics Lens

Finally, double-check with a **Responsible AI quick review**:

- Could this use case **harm** or **exclude** vulnerable groups?
- Does it **reinforce bias** or inequality?
- Will beneficiaries know when they're interacting with AI?
- Is there a **consent/opt-out** process?
- Do we have a plan for **monitoring fairness** over time?

Template 5D – Responsible AI Quick Check

Question	Yes/No	Your Notes
Could this harm or exclude vulnerable groups?		
Are we reinforcing bias or inequality?		
Will beneficiaries know they're using AI?		
Is there a consent/opt-out process?		
Do we monitor fairness and impact regularly?		

Guidelines for Filling the Responsible AI Quick Check

When completing this template, different scenarios may arise depending on how the AI system works and who it affects. The goal is not to have all answers marked “Yes,” but rather to **identify risks early** and ensure there are proper mitigation strategies.

How to interpret the answers:

Question	Yes/No	Your Notes
Could this harm vulnerable groups?	Yes	What the specific risk is? How you plan to mitigate it ?
Are we reinforcing bias?	Yes	Whether additional review or escalation is required
Will beneficiaries know they’re interacting with AI?	No	What needs to be implemented (e.g., disclosure statement, consent workflow) ?
Is there a consent or opt-out process?	No	What is missing?

How to conclude if the AI initiative is responsible

To conclude that an initiative meets Responsible AI expectations:

1. Risks are **identified**, not ignored.
2. Clear mitigation steps are documented for any **“Yes”** risk answers.
3. Critical ethical requirements - **transparency**, **consent**, **fairness monitoring** are already in place or have a concrete implementation plan.
4. **No high-risk issues** remain unresolved.

5.6 Outputs of Section 5

By the end of this section, you will have:

AI Fit Checklist completed.

Feasibility **Scorecard** scored and discussed.

Traffic-Light Gate decision

Prioritizing AI Challenges for Maximum Impact

6.1 Why Prioritization Matters

By now, you may have 3–5 “good” AI challenge statements. But trying to pilot them all at once creates:

- Diluted resources.
- Confused teams.
- Higher failure risk.

Prioritization ensures you :

- Focus on the few use cases that deliver the highest impact soonest.
- Sequence others for later cycles.
- Build momentum with early wins.

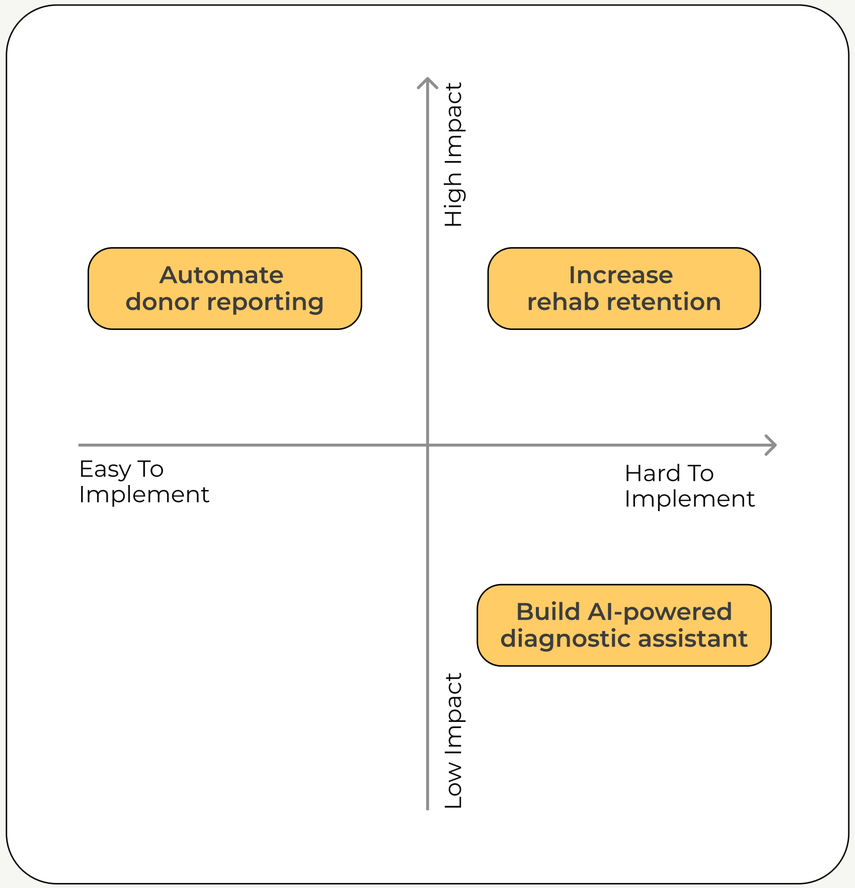
6.2 The Effort vs. Impact Matrix

Plot each challenge on a 2×2 grid:

- **High Impact / Low Effort→** Quick Wins → start here.
- **High Impact / High Effort →** Strategic Bets → plan carefully, maybe next cycle.
- **Low Impact / Low Effort →** Nice-to-Have → keep in mind.
- **Low Impact / High Effort →** Avoid / Park → don’t pursue.

Template 6A – Effort vs. Impact Matrix

Challenge	Effort	Impact	Quadrant	Notes
1. Increase rehab retention	Medium	High	Quick Win	Strong candidate
2. Automate donor reporting	Low	Medium	Quick Win	Good support case
3. Build AI-powered diagnostic assistant	High	High	Nice-to-Have	Needs funding



6.3 AI Priority Scoring Tool

For more granularity, assign scores:

Formula: Priority Score = (Impact × Compatibility) – Effort

Impact :
How much it advances mission & SDG 3 (1–5).

Compatibility :
How well AI fits the problem (from Section 5).

Effort :
Time, cost, and resources required (1–5, higher = harder).

Challenge	Impact (1–5)	AI Compatibility (1–5)	Effort (1–5)	Score (IxC–E)	Rank
Rehab retention	5	5	3	22	#1
Donor reporting automation	3	4	2	10	#3
Staff training tutor	4	4	4	4	#2

6.4 Team-Based Prioritization

To avoid bias, run prioritization as a group exercise:

1. Each team member **independently scores** challenges.
2. Scores are **averaged.**
3. Discuss **outliers** and **disagreements.**
4. Final ranking **agreed by consensus.**

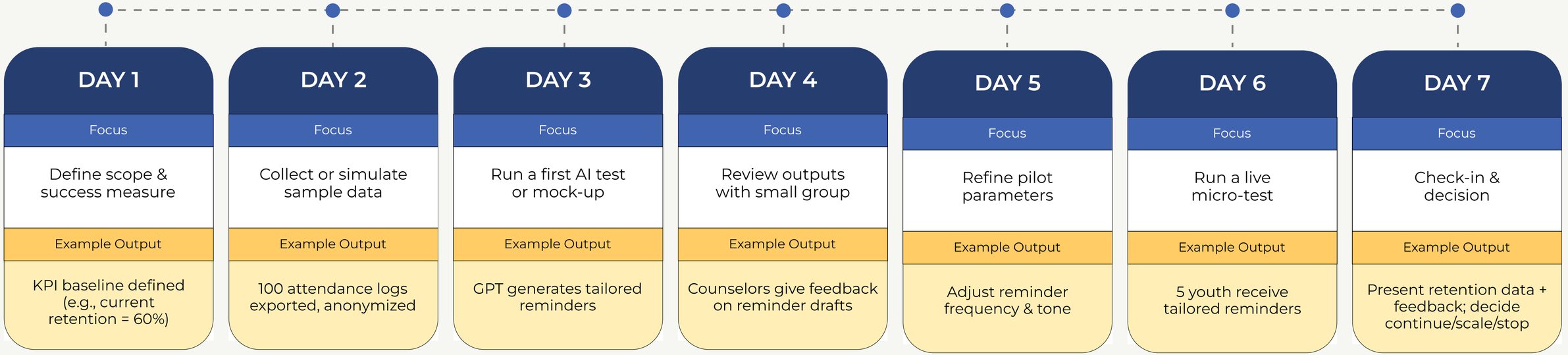
6.5 From Prioritization to Pilot: The 7-Day Plan

Why a 7-Day Plan?

The risk after prioritization is that teams get stuck in endless planning mode. PB1 solves this with a 7-Day Mini-Pilot, a time-boxed way to test your top challenge quickly.

The goal is not to "**build the final AI solution**," but to:

- **Learn fast** from real data.
- **Expose hidden risks** early
- **Build momentum** with stakeholders.
- Create a **clear decision point** at the end of one week.



Outputs of Section 6

By the end of this stage you will have:

- An **Effort vs. Impact** matrix mapping all challenges.
- An AI **Priority Scorecard** with ranked use cases
- Top 1–2 **use cases** selected for piloting.
- A 7-Day Plan **template** filled for your top challenge.
- A **named pilot** owner responsible for execution.
- A Day-7 **meeting scheduled** with decision-makers.

The Trap of Tool-First Thinking

7.1 Why Pitfalls Matter

Even with a strong discovery process, challenge statements, and prioritization, organizations can stumble in execution. The most common errors are predictable and therefore **preventable**.

By learning from others, you can save months of wasted effort and keep momentum alive.

7.2 Pitfall 1 - Jumping Straight to Tools

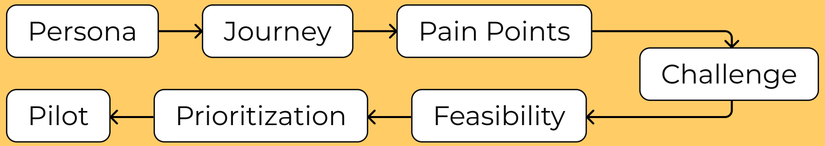
Mistake: Teams get excited by AI platforms (Gemini, Copilot, ChatGPT, Power Automate) and try to plug them in right away.

Why it hurts:

- Creates “solution-first demos” that don’t address real pains.
- Tools may not align with data or SDG goals.
- Wastes time and risks losing credibility.

How to avoid it:

- Follow the Deep Path discipline:



- Do not select tools until after Section 6.

Balancing Impact Focus with Data Truths

7.3 Pitfall 2 - Over-Focusing on Internal Ops

Mistake: Teams concentrate only on efficiency (HR, finance, reporting) instead of **beneficiary-facing** challenges.

Why it hurts:

- Easy wins for staff, but limited impact alignment with **SDG 3**.
- Donors and partners want to see **health** and **well-being outcomes**.

How to avoid it:

- Balance: choose **at least one use case** with direct beneficiary impact.
- Use the **SDG 3 Alignment Map** (Section 4) as a litmus test.

7.4 Pitfall 3 - Ignoring Data Reality

Mistake: Teams assume data exists or is usable without verifying.

Why it hurts:

- AI depends on quality, accessible, and ethical data.
- Sensitive data (PII/PHI) mishandling risks compliance violations & fact checking/input data verification.

How to avoid it:

- Complete the Data Snapshot and Feasibility Scorecard (Section 5).
- Talk to data owners before committing to pilots.
- Scope small if data is limited — pilots can start with samples.

Why Clarity Matters & Why Less Is More

7.5 Pitfall 4 – Vague Challenge Statements

Mistake: Framing challenges **too broadly**, e.g., “AI should improve engagement.”

Why it hurts:

- Hard to measure or test.
- Creates confusion during prioritization.
- Results in weak pilots and wasted effort.

How to avoid it:

- Use the Challenge Statement Template (Section 3).
- Run through SMART+R to force clarity.
- Always define a KPI baseline → target.

7.6 Pitfall 5 – Trying to Do Everything

Mistake: Selecting too many use cases to pilot at once.

Why it hurts:

- Spreads team capacity thin.
- Confuses stakeholders.
- Higher risk of failure across the board.

How to avoid it:

- Use the Effort vs. Impact Matrix and AI Priority Scoring Tool (Section 6).
- Pick one Quick Win + one Strategic Bet maximum.
- Park the rest for future cycles.

Avoiding Pilot Delays & Ethical Blind Spots

7.7 Pitfall 6 – Skipping or Watering Down the 7-Day Pilot

Mistake: Teams delay running a pilot, or extend planning endlessly instead of testing in one week.

Why it hurts:

- Momentum lost → stakeholder interest fades.
- Pilots grow too big, too expensive, too risky.
- Small problems get hidden until they become large failures.

How to avoid it:

- Commit to the 7-Day Mini-Pilot immediately after prioritization (Section 6.6).
- Treat Day 7 as a decision checkpoint: continue, scale, or stop.
- Remember: the goal is learning, not perfection.

7.8 Pitfall 7 – Neglecting Responsible AI

Mistake: Teams assume that if a challenge is feasible, it's automatically ethical.

Why it hurts:

- Risks excluding or burdening vulnerable groups.
- Potential for biased or unsafe outcomes.
- Can damage reputation with donors, partners, and communities.

How to avoid it:

- Complete the Responsible AI Quick Check (Section 5).
- Involve diverse voices in testing and validation.
- Treat any 🔴 Traffic-Light Gate outcome as a hard stop.

7.9 Outputs of Section 7

By the end of this section, you will have:

A **clear playbook** of common pitfalls to avoid.

Confidence in sticking to the **Deep Path discipline**.

A shared “red flag” vocabulary for your team to call out risks early.

The Trap of Tool-First Thinking

8.1 Why Tools Matter

So far, this playbook has helped you define and prioritize AI use cases. Now comes the “with what.”

You don’t need a data science team - many AI tools are **accessible**, **low-code**, or no-code and available today. Others require more technical capacity but give you more control and customization.

8.2 General-Purpose AI Assistants

These are broad AI platforms for text, reasoning, and generation.

Tool	What It Does	Example Use Case
ChatGPT (OpenAI)	Conversational AI for text generation, summarization, Q&A	Draft beneficiary communications, summarize notes
Gemini (Google)	Multimodal AI across text, images, data	Generate program reports, create visuals
Claude (Anthropic)	Long-context AI assistant with strong reasoning	Analyze transcripts, co-create challenge statements

8.2 General-Purpose AI Assistants (Cont.)

Tool	What It Does	Example Use Case
Microsoft Copilot	AI embedded in Word, Excel, Outlook, Teams	Automate donor reporting, extract data trends
LLaMA (Meta)	Open-source language model family for custom use	Deploy locally for privacy-sensitive programs, fine-tune on domain-specific data
Falcon LLM (TII, UAE)	Large language model, open-source, optimized for Arabic	Government chatbots, Arabic NLP applications, enterprise data processing
Noor (Saudi Arabia)	Arabic-centric chatbot and automation platform	Digital assistant for government services, Arabic language understanding
Jais (UAE)	Large multilingual language model for Arabic/English	Customer service AI, education tools, multilingual business automation

Tip: For most nonprofits, ChatGPT, Gemini, Copilot, or Claude will be the easiest entry points. LLaMA and other open models (Mistral, Falcon) are options for advanced teams with tech support.

8.3 Productivity & Workplace AI

Tool	What It Does	Example Use Case
Perplexity AI	AI inside Notion for docs & databases	Auto-generate meeting summaries, program FAQs
tl;dv	Meeting transcriber & summarizer	Summarize beneficiary interviews
Reclaim.ai	Smart scheduling assistant	Optimize counselor calendars
Perplexity AI	Research + fact-finding	Explore program models, funding leads

8.4 Automation, Integration & Knowledge AI

Tool	What It Does	Example Use Case
Power Automate (Microsoft)	Automates workflows across O365 and apps	Auto-send SMS reminders after attendance logs
Zapier	Connects 7k+ apps with AI triggers	Trigger reports → Google Drive → Email
Make.com	Visual no-code automation builder	Intake form → AI summary → CRM update
n8n	Open-source automation workflows	Advanced control, on-prem hosting
RAG (Retrieval-Augmented Generation)	Technique: connects AI to your org's data sources for accurate, domain-specific answers	Build a Q&A bot that pulls directly from your policies, health protocols, or case files

Tip: For most nonprofits, ChatGPT, Gemini, Copilot, or Claude will be the easiest entry points. LLaMA and other open models (Mistral, Falcon) are options for advanced teams with tech support.

8.5 Specialized AI for Nonprofits & Impact

Tool	What It Does	Example Use Case
Relevance AI	AI agents for workflows & decisions	AI “engagement coach” for at-risk youth
Gamma	AI presentations	Fundraising decks
Paradox AI	Recruiting chatbot	Automate staff hiring
Speakly ElevenLabs	AI voice tools	Generate multilingual outreach audio
Virbo Synthesia	AI video generation	Explainers for beneficiaries
Malaffi (Abu Dhabi)	Healthcare data integration and analytics platform	AI-powered electronic medical records, patient insights for providers

Choosing the Right AI for Your Data Workflows

8.6 AI for Data & Analytics

Tool	What It Does	Example Use Case
Power BI + Copilot	AI dashboards	Visualize engagement & outcomes
Tableau AI	Analytics with AI insights	Spot trends in health program data
AppZen	Finance AI	Audit donor spend, flag anomalies

8.7 How to Choose the Right Tool

- **Problem → Tool** (not tool → problem).
- **Check licenses first** - you may already have access (e.g., Copilot with O365).
- **Prioritize ease of use** - frontline staff should be able to experiment.
- Run each through the **Responsible AI Check** (Section 5) before deployment.

Template 8A – Tool Audit Sheet

Tool	Category	Already Have? (Y/N)	Cost/License	Fit for Our Use Cases	Notes
Microsoft Copilot	General/ Productivity	Y (O365)	Included	Donor reporting automation	Staff training needed
Zapier	Automation	N	Subscription	Attendance → reminders	Easy setup
Relevance AI	Specialized	N	Subscription	Engagement agent	Pilot candidate
LLaMA	Open-source	N	Free (infra costs)	Custom, private AI	Needs tech support
RAG setup	Technique	N	Depends on tools	Knowledge Q&A bot	Aligns with case management

8.8 Outputs of Section 8

A **catalog** of AI tools by category.

Mapped **tools** to use cases.

A **Tool Audit Sheet** showing what you already have vs. need to explore.

Turning the Playbook Into a Guided Experience

9.1 Custom GPT Facilitator

To make the process faster and less manual, we recommend **one optimized custom GPT** that serves as your guided facilitator through the entire playbook. Instead of switching between multiple tools, this assistant can walk your team **step by step**, prompting you for inputs and producing structured outputs at each stage.

What the Custom GPT Facilitator Does:

- **Persona Builder →** Asks you about demographics, needs, motivations, and barriers, then generates a detailed beneficiary persona.
- **Journey Mapper →** Guides you through program stages, capturing activities, emotions, tools, frictions, and data created.
- **Challenge Statement Generator →** Takes your clustered pain points and produces structured challenge statements (Problem, Root Causes, Desired Outcome, Constraints, Data Availability).
- **Data Auditor →** Prompts you to list available data sources, owners, access levels, quality, and sensitivity, then outputs a Data Snapshot.
- **Scoring Assistant →** Helps you complete the Feasibility Scorecard and Priority Matrix by asking clarifying questions and assigning preliminary scores.
- **Tool Auditor →** Reviews which AI tools you already have licenses for, suggests integrations, and flags where new tools could be useful.

By combining all of these into one guided flow, the custom GPT effectively acts as a **playbook coach**: it asks you the right questions, structures your answers into templates, and ensures you never skip a step in the process.

Open the custom GPT: https://chatgpt.com/g/g-68e5399ea8b48191b4adf18bf1feaf40-ai-use-case-facilitator

Step-by-Step Guide to Using the Custom GPT Facilitator

(For AI Use Case Development – PB1 Deep Path, aligned to SDG 3)

This guide will help you use the **Custom GPT Facilitator** to walk through the full 10-step playbook process, from defining your program to producing a complete AI Use Case Canvas with a 7-Day Pilot Plan.

Step 1: Start with Start a new AI use case Conversation Starter or Use the Prompt below

Prompt to use: "We are [organization name]. Our program is [program/service name]. Our main goals are [insert]. Our beneficiaries are [insert]. The program is delivered [in-person/digital/hybrid]. The KPI we want to improve is [insert KPI with baseline, target, and ≤12-month timeframe]."

Tip: The more specific your KPI (with baseline + target), the stronger your outputs later.

Step 2: Map Stakeholders

Prompt to use: "List the key stakeholders involved in this program. For each, provide their role, power (H/M/L), and interest (H/M/L)."

GPT will place them in the **Power-Interest Grid** and suggest engagement tactics.

Step 3: Create a Beneficiary Persona

Prompt to use: "Help us create a beneficiary persona for [program/service]. Guide us by asking about demographics, needs, barriers, motivations, and typical behaviors."

Attach an existing persona if you already have one.

Step 4: Build the Journey Map

Prompt to use: “Map the journey of [persona name] through our program. Break into 5–7 stages, showing actions, emotions, tools, pain points, and data generated at each stage.”

Step 5: Extract and Cluster Pain Points

Prompt to use: “From this journey, extract 3–5 critical pain points. Cluster them by theme, and rank them by severity and frequency.”

Step 6: Generate Challenge Statements (with SMART+R)

Prompt to use: “Turn these pain points into structured challenge statements using this format: Problem, Root Causes, Desired Outcome, Constraints, Data. Then run the SMART+R test and refine as needed.”

Step 7: Run Feasibility & Responsible AI Checks

Prompt to use: “Audit available data for this challenge (sources, quality, access, sensitivity). Then run the Feasibility Scorecard and Traffic-Light Gate. Also check for Responsible AI risks (fairness, bias, consent, potential harm).”

If result is Red, GPT will help refine and reframe the challenge.

Step 8: Align to SDG 3

Prompt to use: “Map this challenge to a relevant SDG 3 subtarget and write a one-line impact statement.”

Step 9: Prioritize Use Cases

Prompt to use: “Based on impact (H/M/L) and effort (H/M/L), categorize challenges into Quick Wins, Strategic Bets, Nice-to-Have, or Avoid. Rank them using the Priority Score.”

Step 10: Design a 7-Day Pilot Plan

Prompt to use: “Create a 7-Day Mini-Pilot Plan for the top-ranked challenge. Show day-by-day tasks, roles, and success measures. Include a sponsor pack with a one-pager, slide outline, and draft email.”

Final Output: AI Use Case Canvas (MENA Version)

Prompt to use: “Assemble all results into the AI Use Case Canvas: Program, Persona, Pain Points, Challenge, Data, Feasibility, SDG 3 alignment, Priority, Pilot Plan, and Tools.”

Review & Export:

- Verify that every template is filled.
- Ensure each challenge statement passed SMART+R and Traffic-Light.
- Export the Working Canvas + all templates into your final deck or report.

Use as only an example

Template 1: Program Inventory

Purpose: Anchor the playbook in one program or service.

Program / Service Name

Autists & ADHD
Care India

Delivery Method (In-person / Digital / Hybrid)

Digital

Support Ecosystem (Partners, Agencies, etc.)

Support coaches, trainers and personnel.

Known Challenges / Barriers

Low self-awareness of behavioral symptoms

Limited visibility into user data

Inconsistent program implementation

Lack of participant engagement

Goal(s) of the Program

1. To provide care
2. To provide support
3. To make people aware

Primary Beneficiaries (Who, Where, Scale)

Adults with ADHD (Ages 30-50)

MENA region focus

Current KPIs or Success Measures

Work success rate +10% within 12 months

People served per month

Tip: This inventory defines your anchor program and sets measurable targets, it will guide all following templates (persona, journey, challenge mapping). Read this slide and fill up the next similar slide on your own.

To be filled

Template 1: Program Inventory

Purpose: Anchor the playbook in one program or service.

Program / Service Name	Delivery Method (In-person / Digital / Hybrid)	Support Ecosystem (Partners, Agencies, etc.)	Known Challenges / Barriers

Goal(s) of the Program	Primary Beneficiaries (Who, Where, Scale)	Current KPIs or Success Measures

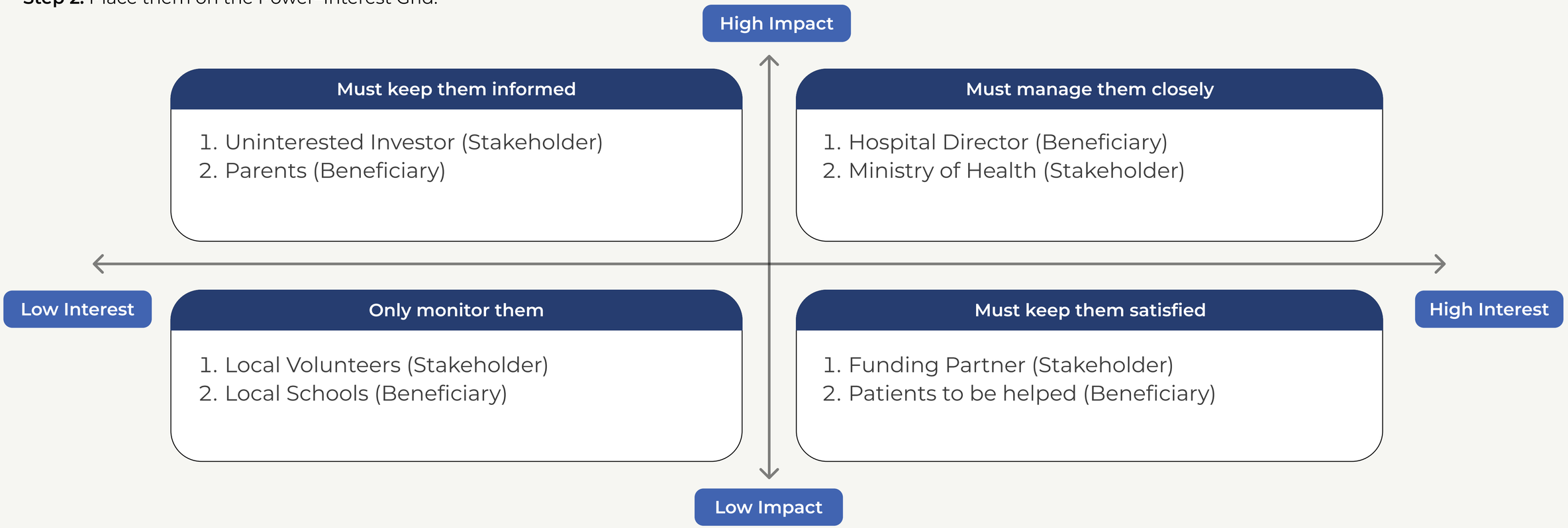
Tip: This inventory defines your anchor program and sets measurable targets, it will guide all following templates (persona, journey, challenge mapping). Read this slide and fill up the next similar slide on your own.

Template 2: Stakeholder & Beneficiary Mapping

Use as only an example

Purpose: Anchor the playbook in one program or service.

Step 1: List stakeholders & Beneficiaries.
Step 2: Place them on the Power–Interest Grid.



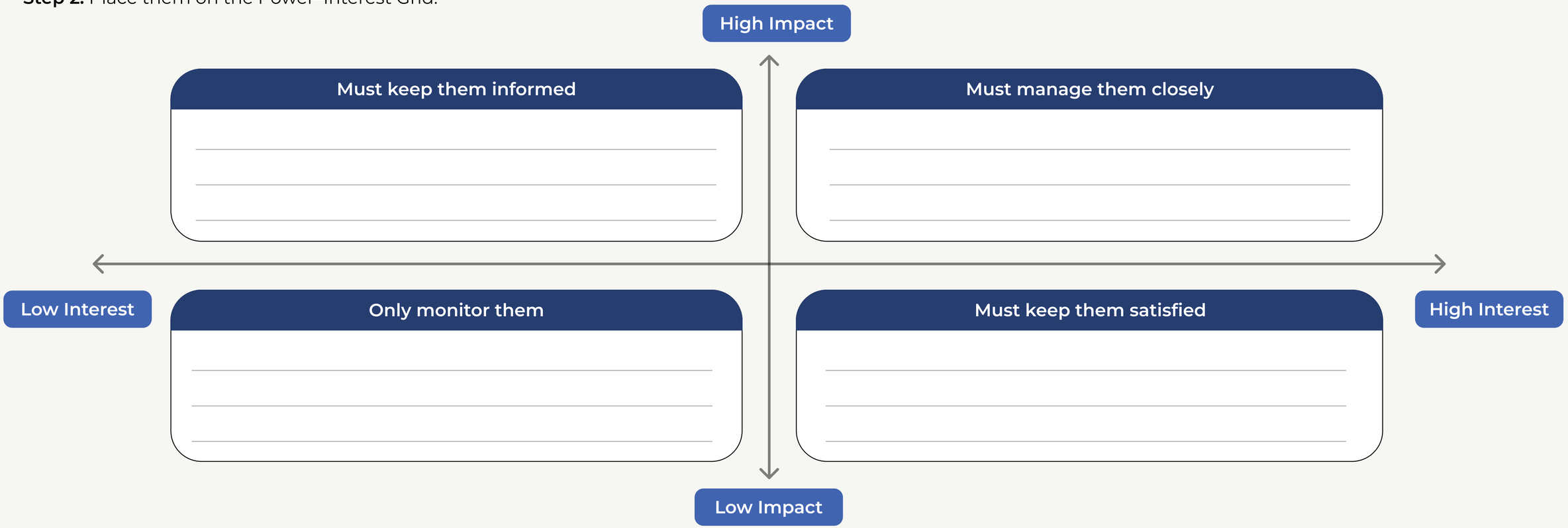
Tip: Visualize stakeholders from both your organization and partner networks. Beneficiaries belong on this map too, they're your most important voices. The top right quadrant is the most critical one.

To be filled

Template 2: Stakeholder & Beneficiary Mapping

Purpose: Anchor the playbook in one program or service.

Step 1: List stakeholders & Beneficiaries.
Step 2: Place them on the Power–Interest Grid.



Tip: Visualize stakeholders from both your organization and partner networks. Beneficiaries belong on this map too, they're your most important voices. The top right quadrant is the most critical one.

Template 3: Beneficiary Persona Canvas

Use as only an example

Purpose: Humanize your target beneficiary and concretizing details.

Lina Kiln

The Focused Educator
Primary school teacher with ADHD balancing structure and creativity

Age:	24 Years
Job:	Educator
Location:	Abu Dhabi

Adjective 1 | Adj. 2 | Adjective 3 | Adjective 4

Motivations & Goals:

- Wants to stay focused through the day
- Aims to inspire students through empathy
- Seeks tools that reward consistency

Barriers:

- Limited Arabic ADHD resources
- App UX too clinical / not relatable
- Fear of sharing mental-health data

Needs & Struggles:

- Needs flexible reminder systems
- Struggles with time management
- Overwhelmed by multi-app juggling

Emotions & Quotes

"I'm not looking for perfection just a way to stay consistent."

Important Insight: Lina thrives when tools mirror her emotional rhythm, automation that adapts to her mood will help her most.

Template 3: Beneficiary Persona Canvas

To be filled

Purpose: Humanize your target beneficiary and concretizing details.

Age:

Job:

Location:

Motivations & Goals:

Barriers:

Needs & Struggles:

Emotions & Quotes

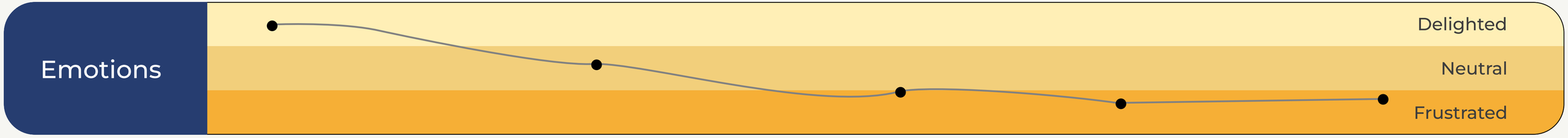
Important Insight:

Template 4: Journey Map

Use as only an example

Purpose: Trace beneficiary's steps, emotions, and data.

Ability Stage	Stage One	Planning	Sessions	Parental feedback	Notes
Story	• Arrival at the center. • Have coffee. (repeated 8 times per day) • Check the schedule.	Planning the sessions.	Providing the sessions.	Feedback to the families.	Completing EMR notes.
Actions	Catching up with colleagues for discussions on therapy notes.	• Checking the bookings. • Setting up the therapy room with activities, equipment.	• Conducting the session according to schedule. • Writing her notes.	Giving feedback to the parents.	• Completing EMR notes. • Planning for upcoming sessions.
Thoughts	• Mood will be set depending on her scheduled. • Easy and hard patients. • Goals of the day.	• Think about diagnosis. • Think about suitable activities. • Think about treatment plan.	• Any changes is required depending on the kids response. • Manage behaviour issues as the sessions goes on	• Face to face meeting • How did the session go • Some will have complaints some will be happy • How to communicate with the parents	• How much time do I have available to complete EMR notes? • Can I remember all the notes? • Did I miss anything?
Tools Used	Use her laptop to check schedule.	Laptop	Laptop, iPad, AAC applications	WhatsApp, Email	EMR on the laptop



To be filled

Template 4: Journey Map

Purpose: Trace beneficiary's steps, emotions, and data.

Ability Stage	Stage One	Planning	Sessions	Parental feedback	Notes
Story					
Actions					
Thoughts					
Tools Used					

Emotions	
	Delighted
	Neutral
	Frustrated

Template 5: Pain Point Clustering Sheet

Use as only an example

Purpose: Organize challenges into themes.

Cluster A: System / Tools Issues

Data entry takes too long.	Severity: **High**
App crashes on login.	Severity: **High**
Analytics dashboard is confusing.	Severity: **Medium**
Users can't export progress reports.	Severity: **Low**

Cluster B: People / Process Gaps

No follow-up reminders after onboarding.	Severity: **High**
Lack of progress feedback.	Severity: **High**
Unclear app usage instructions.	Severity: **Medium**
Support team response is inconsistent.	Severity: Medium

Cluster C: Access / Motivation

Drop in motivation after two weeks.	Severity: **High**
No gamification or rewards.	Severity: **Medium**
Limited Arabic content.	Severity: **Low**

To be filled

Template 5: Pain Point Clustering Sheet

Purpose: Organize challenges into themes.

Cluster A: System / Tools Issues		Cluster B: People / Process Gaps		Cluster C: Access / Motivation	
	Severity:		Severity:		Severity:
	Severity:		Severity:		Severity:
	Severity:		Severity:		Severity:
	Severity:		Severity:		

Use as only an example

Template 6: AI Challenge Statement

Purpose: Turn pain points into structured, AI-ready problems.

Problem Statement	Users with ADHD drop off after two weeks because manual session tracking is time-consuming and unmotivating.
Root Causes	• Manual data entry increases friction. • No real-time feedback or motivation. • Lack of personalization or smart reminders.
Desired Outcome	Beneficiaries can track focus sessions automatically, get adaptive reminders, and visualize progress to stay engaged.
Constraints/ Requirements	• Protect user privacy. • Support bilingual UX (Arabic/English). • Integrate with existing tools (Trello, Calendar).
Data Availability	• Existing: user logs, engagement data. • Potential: feedback forms, device tracking sensors.

To be filled

Template 6: AI Challenge Statement

Purpose: Turn pain points into structured, AI-ready problems.

Problem Statement	
Root Causes	
Desired Outcome	
Constraints/ Requirements	
Data Availability	

Template 7: SMART+R Test

Use as only an example

Purpose: Validate each challenge statement.

Specific	Measurable	Achievable	Relevant	Responsible
Is the challenge clearly defined and focused on one core issue?	Can we measure success with clear indicators or KPIs?	Is the solution realistic given current resources and capacity?	Does this challenge align with the organization's mission and SDG 3 (Health & Wellbeing)	Is the AI solution ethical, inclusive, and privacy-compliant?
☑ Yes	☑ Yes	☑ Yes	☑ Yes	☑ Yes
Notes: It targets ADHD users who drop off after two weeks due to manual tracking.	**Notes:** Progress tracked through weekly session logs and engagement rates.	**Notes:** AI tools like Copilot and Gemini can automate the tracking process easily.	**Notes:** Supports mental health and behavior improvement for adults with ADHD.	**Notes:** No personal data stored; model outputs reviewed for fairness.

To be filled

Template 7: SMART+R Test

Purpose: Validate each challenge statement.

Specific	Measurable	Achievable	Relevant	Responsible
☐ ___	☐ ___	☐ ___	☐ ___	☐ ___
Notes:	Notes:	Notes:	Notes:	Notes:

Template 8: Feasibility Scorecard

Use as only an example

Purpose: Assess viability using a scoring system (1–5).

AI Compatibility

Does this challenge fit an AI-suitable pattern (repetitive, data-driven, predictive)?

Score: **4**

Notes: Manual tracking and reminders can be automated by AI.

Data Feasibility

Is quality data available, accessible, and sufficient?

Score: **4**

Notes: User activity logs and reminders can be automated by AI.

Alignment with SDG 3

Does this contribute directly to health and wellbeing goals?

Score: **5**

Notes: Supports self-awareness and mental health improvement.

Equity & Inclusion

Does the AI solution serve diverse groups fairly and inclusively?

Score: **4**

Notes: Supports bilingual access (Arabic/English) and adaptive UX.

Technical Feasibility

Do we have the tools, infrastructure, & technical capacity?

Score: **3**

Notes: Basic infrastructure exists; needs some API setup.

Regulatory & Compliance Risk

Are data privacy, consent, and compliance requirements met?

Score: **5**

Notes: Anonymous data only; clear consent process.

Potential for Scalable Impact

Can the solution expand beyond the pilot group or region?

Score: **4**

Notes: Easily replicable in similar digital wellbeing programs.

Equity & Inclusion

Is the organization prepared in mindset, skills, and governance?

Score: **3**

Notes: Team open to AI but needs internal champions and upskilling.

Grand Total: 32**/40**

Note: Scores below 25 indicate readiness gaps. Strengthen weak areas before piloting.

To be filled

Template 8: Feasibility Scorecard

Purpose: Assess viability using a scoring system (1–5).

AI Compatibility

Score: ___
Notes: _____

Data Feasibility

Score: ___
Notes: _____

Alignment with SDG 3

Score: ___
Notes: _____

Equity & Inclusion

Score: ___
Notes: _____

Technical Feasibility

Score: ___
Notes: _____

Regulatory & Compliance Risk

Score: ___
Notes: _____

Potential for Scalable Impact

Score: ___
Notes: _____

Equity & Inclusion

Score: ___
Notes: _____

Grand Total: ___ /40

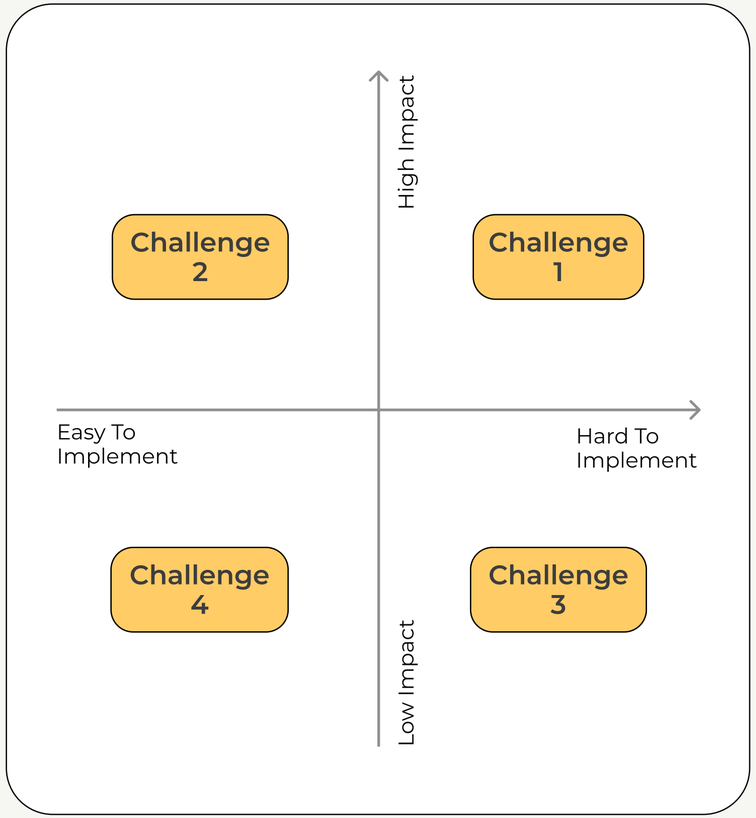
Note: Scores below 25 indicate readiness gaps. Strengthen weak areas before piloting.

Template 9: Effort vs. Impact Matrix

Use as only an example

Purpose: Prioritize use cases visually.

Challenge	Effort	Impact	Quadrant	Notes
1. AI chatbot to answer FAQs for patients	Easy	High	Quick Win	Could be implemented with ChatGPT/Gemini; reduces staff workload quickly.
2. Predictive model for disease outbreaks	High	High	Strategic Bet	Needs lots of health data + advanced AI, but could transform prevention.
3. Automating internal HR leave requests	Low	Low	Nice-to-Have	Easy but doesn't contribute much to SDG 3 impact.
4. AI tool for personalized therapy recommendations	High	Low	Avoid/Park	Complex build but unclear beneficiary value.

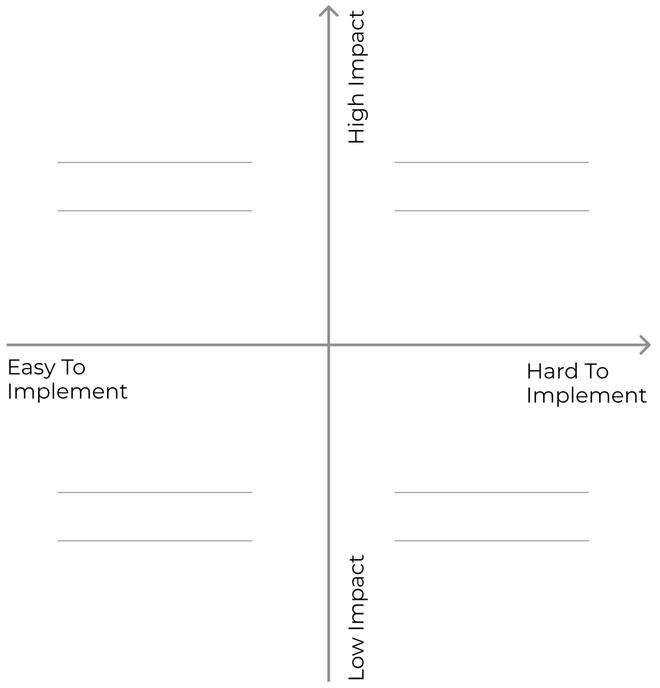


To be filled

Template 9: Effort vs. Impact Matrix

Purpose: Prioritize use cases visually.

Challenge	Effort	Impact	Quadrant	Notes



Template 10: AI Priority Scorecard

Use as only an example

Purpose: Rank challenges numerically.

	Weight (1-5)	Score (1-5)
Beneficiary Impact How much does solving this improve user wellbeing or outcomes?		5
AI Fit How well does the problem suit AI automation or intelligence?	☆☆☆☆	4
Data Feasibility Is the required data available and usable for AI?		3
Effort Level How much effort/resources are required?	☆☆	2
Alignment to Mission & SDG 3 Does it strongly support your organization's mission and health impact goals?		4

Grand Total: 70 | Use for ranking challenges.

To be filled

Template 10: AI Priority Scorecard

Purpose: Rank challenges numerically.

	Weight (1-5)	Score (1-5)
Beneficiary Impact		
AI Fit		
Data Feasibility		
Effort Level		
Alignment to Mission & SDG 3		

Grand Total: _____ | Use for ranking challenges.

Template 11: 7-Day Pilot Plan

Use as only an example

Purpose: Move from plan to action quickly.

DAY 1-2	DAY 3-4	DAY 5	DAY 6	DAY 7
Define Challenge + Success Metric	Gather Sample Data + Prototype	Internal Test	Refine + Prepare Sponsor Pack	Current KPIs/ Success Measures
Finalize challenge statement and measurable KPI	Collect 50 data records and create a simple automation in Relevance AI	Run the first internal demo with your team; log results	Summarize findings; prepare a 1-page report and presentation	Work success rate +10% within 12 months

Pilot Fields

Pilot Challenge Statement	Data/Inputs Needed	Success Metric(s)	Team Roles	Day-7 Sponsor Pack
Use AI to predict no-show risk in mental-health coaching sessions	3 months of attendance data, coach feedback forms, anonymized user logs	≥ 10% reduction in no-shows within 4 weeks	Project Lead - Roxy; Data Analyst - Roman; Technical Lead - Ian	1-page summary, 3 slides, and email brief for program director

To be filled

Template 11: 7-Day Pilot Plan

Purpose: Move from plan to action quickly.

DAY 1-2
Define Challenge + Success Metric

DAY 3-4
Gather Sample Data + Prototype

DAY 5
Internal Test

DAY 6
Refine + Prepare Sponsor Pack

DAY 7
Current KPIs/ Success Measures

Pilot Fields

Pilot Challenge Statement

Data/Inputs Needed

Success Metric(s)

Team Roles

Day-7 Sponsor Pack

9.3 Additional Resources

To strengthen your use cases and make them presentation-ready, we recommend these resources

AI for SDG 3 Case Study Pack

Purpose: Provide real-world examples of how AI has been applied in health, mental health, and wellbeing aligned with SDG 3. These case studies inspire organizations and help them benchmark their own AI ideas.

Case Study 1 AI-powered Diabetes Monitoring	Case Study 2 Mental Health Chatbot	Case Study 3 Maternal Health Early Warning System
UAE	EGYPT	KENYA
Description: Mobile app using predictive AI to track blood sugar levels, provide reminders, and alert caregivers when readings are abnormal.	**Description:** 24/7 chatbot offering CBT-based prompts in Arabic and English, helping youth manage anxiety and depression symptoms.	**Description:** AI model analyzing patient vitals during pregnancy to flag risk of complications, integrated with rural clinics.
Relevance to SDG 3: SDG 3.4 – Reduce premature mortality from NCDs through prevention & treatment.	**Relevance to SDG 3:** SDG 3.4 – Promote mental health and wellbeing.	**Relevance to SDG 3:** SDG 3.1 – Reduce global maternal mortality ratio.

9.3 Additional Resources(Cont.)

Case Study 4
Drug Supply Chain Optimization

JORDAN

Description: AI system forecasting demand for essential medicines across hospitals, reducing stockouts and wastage.

Relevance to SDG 3 : SDG 3.8 – Achieve universal access to essential medicines and vaccines.

Case Study 5
AI Triage in Emergency Care

SAUDI ARABIA

Description: AI triage system to prioritize ER patients based on severity, reducing wait times and improving outcomes.

Relevance to SDG 3: SDG 3.8 – Access to quality essential healthcare services.

Template 12: AI Use Case Canvas (MENA Version)

Purpose: Capture each AI use case on a single page, linking program context, pain points, feasibility, SDG alignment, and pilot planning.

Audience: Designed for nonprofits, social impact orgs, and health-focused programs in the MENA region.

Section	Description	Example (Healthcare Nonprofit in UAE)
Program/Service	Which program is this tied to?	“Community Diabetes Prevention Program”
Beneficiary Persona	The key beneficiary group & persona name	“Fatima, 45-year-old working mother with Type 2 diabetes”
Pain Point	The lived challenge from the journey map	“Community Diabetes Prevention Program”
AI Challenge Statement	Structured statement (Problem, Root Cause, Outcome, Constraints, Data)	Problem: Patients missing appointments → Root cause: manual reminders → Desired outcome: automated reminders & adherence → Data: patient scheduling logs
Data Sources	What data is available? Where does it live	“Hospital appointment logs, SMS/WhatsApp data, EHR system”
Feasibility Score	From Feasibility Scorecard (Green/Yellow/Red)	“Green – Low technical complexity, data accessible”
SDG 3 Subtarget	Relevant SDG 3 goal this supports	“SDG 3.4: Reduce premature mortality from NCDs through prevention & treatment”
Priority Rank	Where it landed in Effort/Impact prioritization	“Quick Win (High Impact / Low Effort)”
7-Day Pilot Plan (Summary)	Short version of Template 11	-Day 1–2: Define reminder script - Day 3–4: Test with 20 patients - Day 5: Collect feedback -Day 6: Refine model - Day 7: Present results to director
Tools / AI Options	AI platforms or techniques that could be used	“Microsoft Power Automate + WhatsApp integration; optional RAG model to personalize reminders”

Detailed Prompt Library for custom GPT & Guide for Each Step

→ Ready-to-use AI prompts, tailored to each playbook section (Persona creation, Challenge generation, Data audit, etc.).

Purpose: Provide ready-to-use AI prompts tailored to each section of the playbook. These prompts are designed for tools like ChatGPT, Gemini, or Claude, and can be adapted for any custom GPT you create.

1. Persona Creation (Section 2.4)

Prompt : "You are helping me create a detailed beneficiary persona for [Program/Service]. The persona should include: demographics, goals, barriers, emotions, context, and current behaviors. Focus on realism and avoid stereotypes. Present the persona in a clear profile format with a name and short backstory."

Example Output: Fatima, 45-year-old working mother with Type 2 diabetes, who struggles with clinic attendance due to scheduling conflicts.

2. Journey Mapping (Section 2.5)

Prompt: "Map the journey of [Persona Name] as they go through [Program/Service]. Break it down into 5–7 stages. For each stage, list: actions, emotions, tools/resources used, pain points, and data generated."

3. Pain Point Extraction (Section 2.6)

Prompt: "From this journey map, extract the 3–5 most critical pain points for [Persona Name]. Cluster them into themes and rank them by impact and frequency. Present as a list with short explanations."

Detailed Prompt Library for custom GPT & Guide for Each Step

4.Challenge Statement Generation (Section 3.2)

"Turn this pain point into a structured AI challenge statement. Use this format:
1.Problem Statement
2.Root Causes
3.Desired Outcome
4.Constraints/Requirements
Data Availability"

5. SMART+R Test (Section 3.3)

Prompt: "Evaluate this challenge statement against the SMART+R test. Check if it is Specific, Measurable, Achievable, Relevant, Time-bound, and Responsible. Suggest improvements if any element is weak."

6. Data Audit (Section 4/5)

"Help me audit data for this use case. Ask: What data exists? Where is it stored? What's the quality? Is it sensitive? Suggest ways to improve data readiness. Present in a structured table."

7. Feasibility Scorecard (Section 5.3)

"Score this use case on these criteria: AI compatibility, technical feasibility, regulatory risk, scalability, equity & inclusion, mission alignment. Provide scores (High/Med/Low) and rationale for each."

8. Prioritization (Section 6)

"Based on effort vs. impact, categorize these use cases into: Quick Wins, Strategic Bets, Nice-to-Have, Avoid. Present as a table with justifications."

9. 7-Day Pilot Plan (Section 6.6)

"Design a 7-day mini-pilot plan for this AI use case. Break down activities by day, expected outputs, and who should be involved. Keep it lightweight and test-focused."

10. Responsible AI & Ethics Check (Cross-cutting)

"Design a 7-day mini-pilot plan for this AI use case. Break down activities by day, expected outputs, and who should be involved. Keep it lightweight and test-focused."