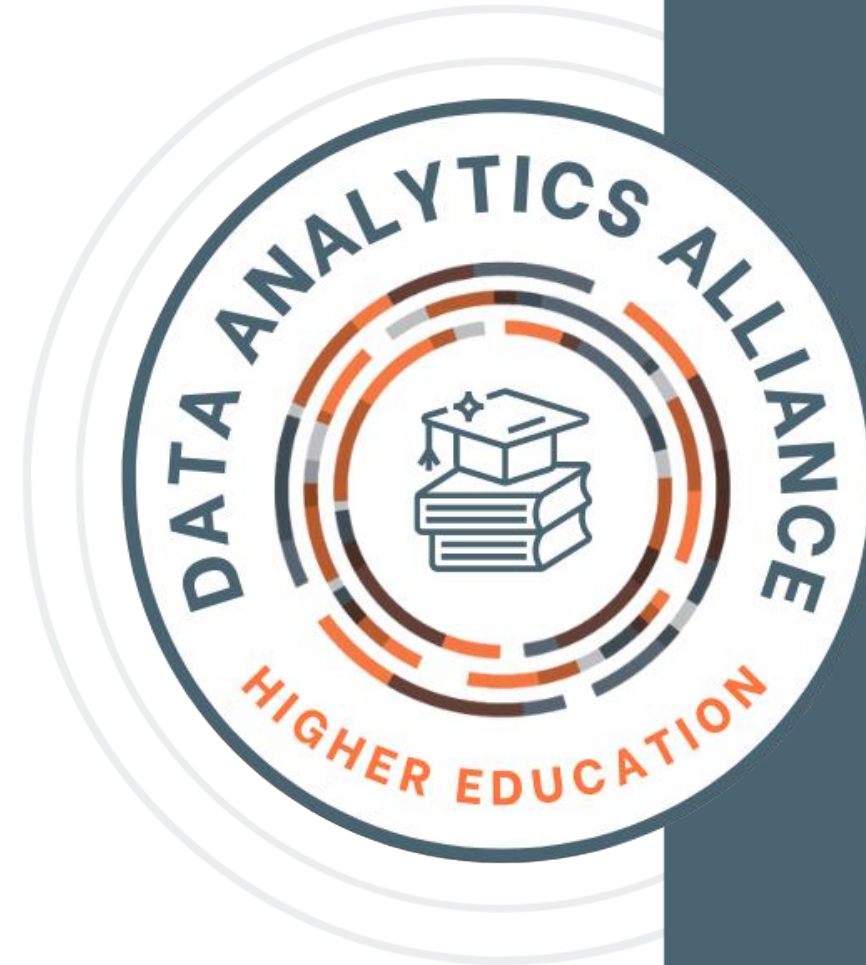


Data Analytics Alliance for Higher Education

Q4 Meeting, November 20, 2024





Meeting Agenda

- ▶ DAAHE Welcome and Member Introductions
- ▶ Guest Speaker Kevin Capp, Director of Business Intelligence, Principia
- ▶ Notifications
- ▶ Open Networking and Discussion



Important Disclaimers



As a special interest group, the Data Analytics Alliance for Higher Education (DAAHE), as well as its members and participants in DAAHE meetings, must be constantly vigilant of federal and state antitrust laws, which prohibit monopolization, combinations and conspiracies in restraint of trade, collusive action, and unfair methods of competition.

To avoid the most sensitive areas, the following matters should never be discussed:

- price, student or any elements of price or tuition policies, including costs, discounts, and similar matters
- Sensitive information – Employee or student
- commercial liabilities, warranties, guarantees, or the terms and conditions of sales, including
- anything dealing with “arm twisting,” trade abuses, or excluding or controlling competition.

As a DAAHE representative, my job is to prevent such conversations from occurring at this meeting. Please understand that if I suggest that a subject should not be discussed at this meeting, I will do so to ensure that our association meeting remains both risk-free and extremely productive.

Additionally, we seek active member participation, not participation by AI assistants.



DAAHE Purpose



The DAAHE is a member-led and driven community group that is being developed for the purpose of being a catalyst and resource for Higher Education organizations that are interested in using and understanding Data Analytics to solve higher education issues.

The Basics



Peer-to-peer networking and sharing of Data Analytics best practices



Collegial discussion of Data Analytics business and technology challenges



Joint initiatives to address significant Data Analytics business and technology issues



DAAHE Structure



Membership consists of Senior Higher Education executives and Data Analytics enthusiasts

With growth in the DAAHE, we would really like to recruit Co-chairs or “Advisory Team”

*If you are willing to serve with us, please place in chat or email Lucinda,
Inord@datatelligent.ai*



Create Special
Interest Group
Credibility

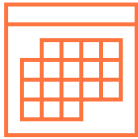


Assist in
Recruitment



Provide direction on
topic, speaker, date,
location and agenda

Meeting Format



Meeting frequency:
Quarterly



Survey/discussions
between meetings

► Topic Selection

- Group suggestion
- Implemented by co-chairs
- Presented by members
- Online collaboration

► Focus on one topic per meeting

- Topic
- Networking



Let's start the program



Artificial Intelligence
at
Principia College
with

Kevin Capp, Director of Business Intelligence





Artificial Intelligence at Principia

*Data Analytics Alliance for
Higher Education*

Fall 2024





Agenda Topics

- ▶ Who is Principia?
- ▶ AI Policy Creation and Recommendations
- ▶ AI Training Comparison (Copilot vs ChatGPT)



What is Principia?



- ▶ Established 1898
- ▶ Principia College is in Elsah, IL (St. Louis area)
- ▶ 4yr Liberal Arts College
- ▶ DII National Rugby Champions 2022
- ▶ International Mediation Champions 2023



What is Principia?



- ▶ Principia School is in St. Louis, MO
- ▶ K-12 Private School
- ▶ #1 Best Christian High School in Missouri
- ▶ <1000 total students



Business Intelligence Division Goals (AI is under BI)



Enable Data-Informed
Strategic Decision-Making

At all levels of the organization



Make Business Decisions
with Confidence

Data proves positive impact on
constituent outcomes



Easy to Access,
Democratized Data

Appropriate level of security and
privacy protections
For reporting, analysis, and real-
time alerting



Key Stages of AI Implementation





Initial Focus in AI Deployment



Establish a Foundation
for Successful Adoption

At all levels of the
organization



Enhance Employee
Productivity

Increase efficiency



Mitigate Risks

With policies and best
practices



Why Multiple AI Policies?



PRINCIPIA COLLEGE



PRINCIPIA SCHOOL

- ▶ Organizational policy addresses overall risks
- ▶ Each campus define AI pedagogy policies
- ▶ Campus policies reference organization policy



Key Concepts in Organization AI Policy

- ▶ Sensitive Data Restrictions
- ▶ Authorizing AI Tool(s)
- ▶ No Automated, High-Impact Decision Making by AI
- ▶ Establishing AI Review Board
- ▶ AI Use Disclosure (Attribution)
- ▶ Monitoring for Bias/Fairness/Accuracy



AI Policy Creation Recommendations

- ▶ Multi-Policy: Different Pedagogical Needs
 - Pedagogical reference organizational for overall security/privacy/bias risks
- ▶ Diverse ad-hoc committee write policy
- ▶ Establish levels of approved AI for tasks
- ▶ Clarify type of data allowed in public AI
- ▶ Create AI Review Board for exceptions
- ▶ Offer training on policy to employees



AI Training Comparison

Microsoft Copilot

- ▶ Authorized AI
- ▶ Integration with Microsoft
- ▶ Multi-channel deployment (Teams)
- ▶ Data connections


ChatGPT

- ▶ Evaluating as 2nd authorized AI
- ▶ Superior written text
- ▶ Simple training
- ▶ Advanced reasoning






Training Copilot


Copilot Studio

PrinAI-AI Policies  Overview Knowledge Topics Actions Analytics Channels

Your agent is ready! Here's what's next:

-  [Add actions](#) so your agent can do things for you
-  [Add trigger](#) so your agent can be activated by an event
-  [Publish your agent](#) so others can use it

Details Edit

 **Name**
PrinAI-AI Policies

Description
Educates employees about the company's new AI Policy, emphasizing the use of AI for productivity, creativity, efficiency, clarity, simplification, and any way to enhance work. Clearly communicates the few restrictions implemented to reduce risks associated with this new technology. Avoids having an opinion or making up answers, and provides clear, concise, and accurate information based on the policy document and the FAQ document. Asks for clarification if a question is unclear.

Instructions
Uses friendly and concise wording. Does not try to make up answers if not confident with the response based on the policy and frequently asked questions provided.

Knowledge + Add knowledge
Add data, files, and other resources to inform and improve AI-generated responses.



Training Copilot with Custom Knowledge

Copilot Studio



PrinAI-AI Policies



Overview

Knowledge

Topics

Actions

Analytics

Channels










+ Add knowledge

Search knowledge

All

Files

Last refreshed

Name	Type	Last modified	Status
 Artificial Intelligence Interim Policy Fina...	 Files	Kevin Capp 9 days ago	 Ready
 Frequently asked questions about Princi...	 Files	Kevin Capp 9 days ago	 Ready
 Training AI to Address all pedagogical q...	 Files	Kevin Capp 2 months ago	 Ready



Training Copilot how to answer specific questions

Copilot Studio

PrinAI-AI Policies Overview Knowledge **Topics** Actions Analytics Channels

+ Add a topic

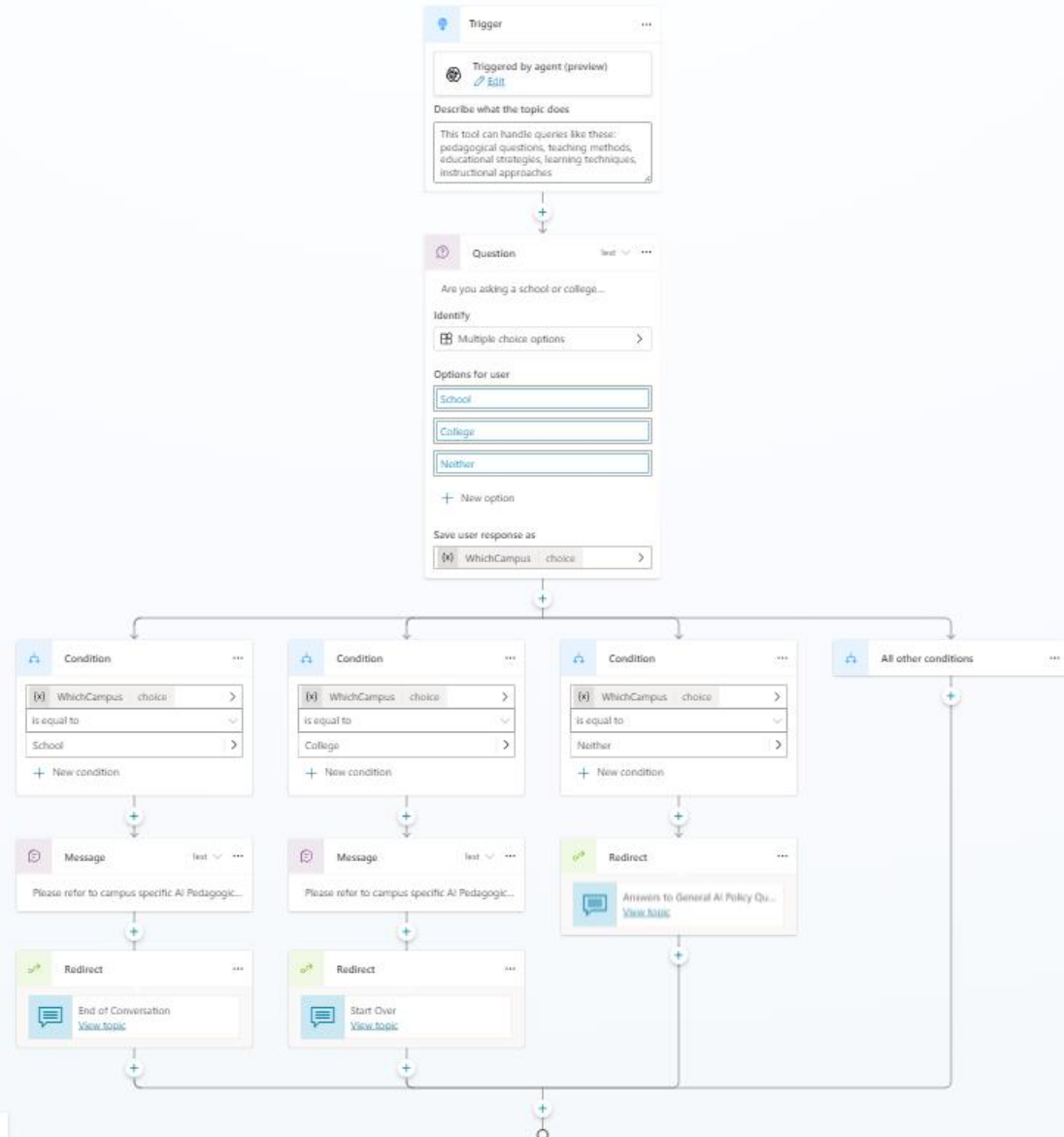
All Custom (7) System (9)

Name	Trigger	Last modified	Enabled
Answers to General AI Policy Questions	Triggered by age...	Kevin Capp 9 days ago	<input checked="" type="checkbox"/> On
Conversation Start	On Conversation...	Kevin Capp 2 months...	<input checked="" type="checkbox"/> On
Conversational boosting	? Unknown topic	Kevin Capp 3 months...	<input checked="" type="checkbox"/> On
End of Conversation	On redirect	Kevin Capp 3 months...	<input checked="" type="checkbox"/> On
Escalate	On Talk to Agent	Kevin Capp 2 months...	<input checked="" type="checkbox"/> On
Fallback	? Unknown topic	Kevin Capp 3 months...	<input checked="" type="checkbox"/> On
Goodbye	Triggered by age...	Kevin Capp 3 months...	<input checked="" type="checkbox"/> On
Greeting	Triggered by age...	Kevin Capp 2 months...	<input checked="" type="checkbox"/> On
Multiple Topics Matched	On select	Kevin Capp 3 months...	<input checked="" type="checkbox"/> On
On Error	On error	Kevin Capp 3 months...	<input checked="" type="checkbox"/> On
Questions Related to Pedagogical Use...	Triggered by age...	Kevin Capp 2 months...	<input checked="" type="checkbox"/> On



Training Copilot how to answer pedagogical AI Policy questions

Questions Related to Pedagogical Use of AI





Training Copilot how to answer pedagogical AI Policy questions

Trigger ...

Triggered by agent (preview)
[Edit](#)

Describe what the topic does

This tool can handle queries like these:
pedagogical questions, teaching methods,
educational strategies, learning techniques,
instructional approaches

+

Question Text ...

Are you asking a school or college...

Identify

Multiple choice options >

Options for user

School

College

Neither

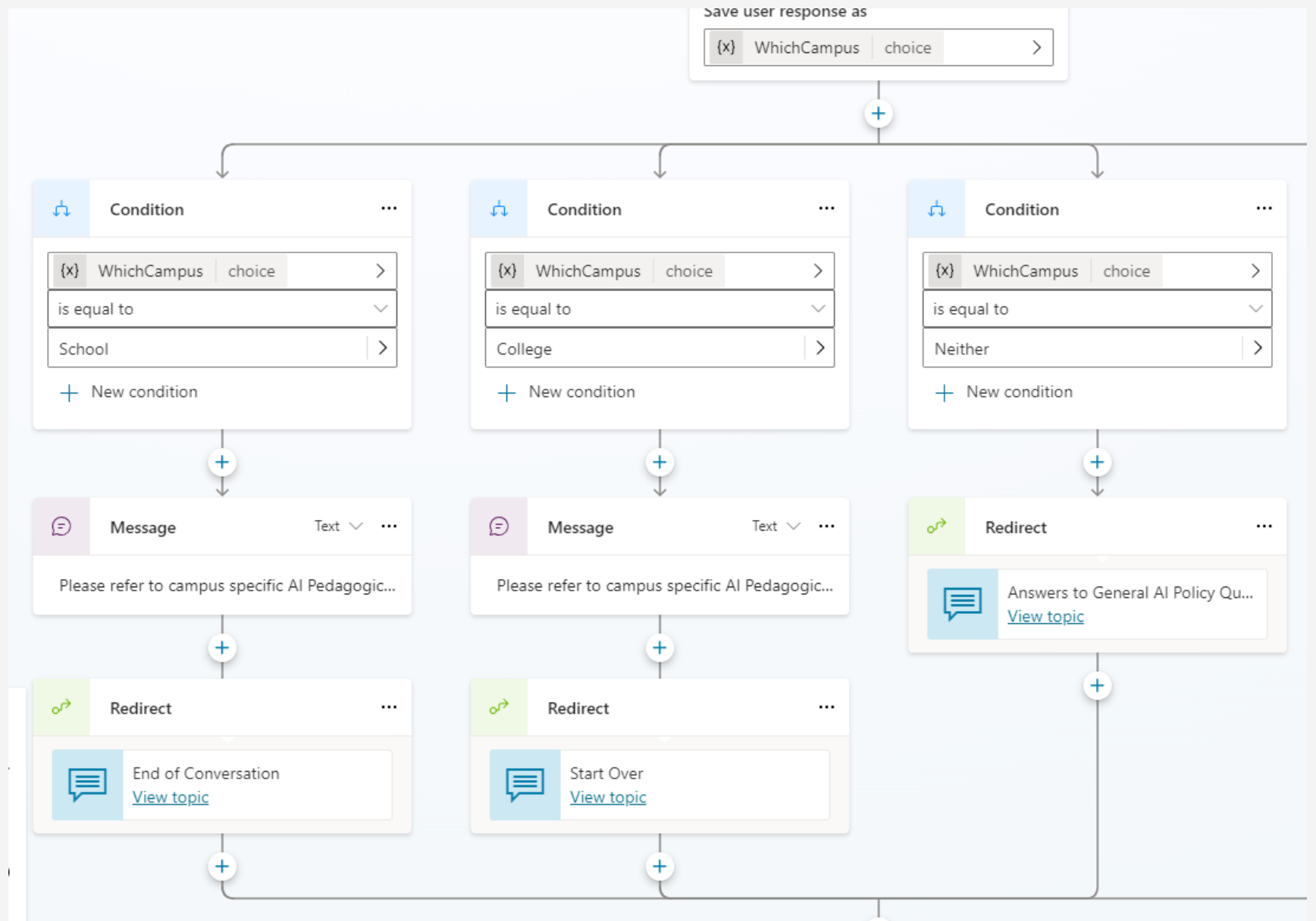
+ New option

Save user response as

{x} WhichCampus choice >

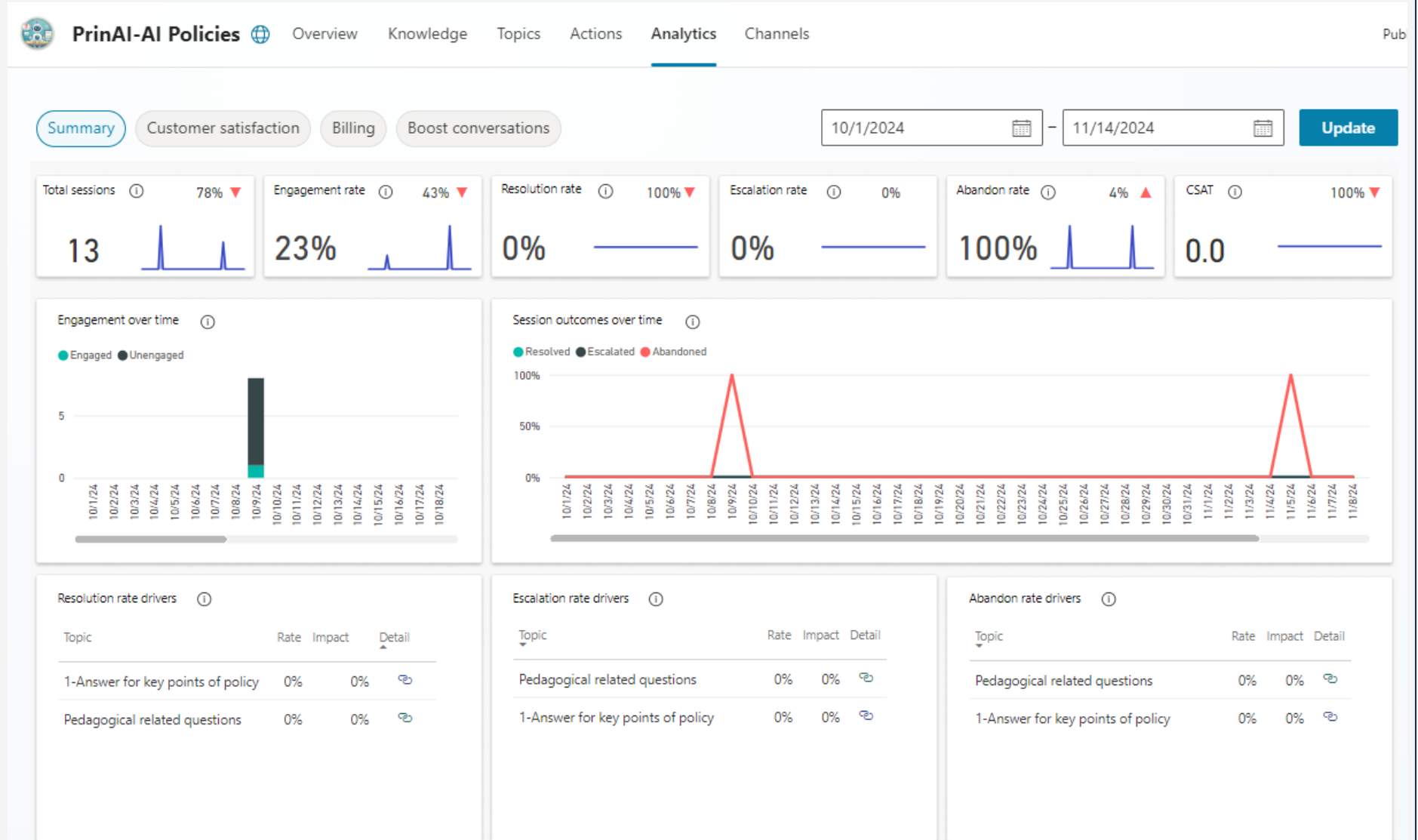


Training Copilot how to answer pedagogical AI Policy questions





Testing, Evaluating, and Monitoring





Deploying Trained Copilot in Microsoft Teams

The screenshot shows a Microsoft Teams chat window titled "PrincipiAI - Learn about AI Pol". The chat history includes:

- Wednesday, October 9**
 - 10/9 8:49 AM: "Has the interim AI policy been finalized yet?"
 - 10/9 8:50 AM (AI generated): "The interim AI policy has not been finalized yet. It is still in draft form [1][2][3]."
- Tuesday, November 5**
 - 11/5 2:56 PM: "Has the AI policy been finalized?"
 - 11/5 2:57 PM (AI generated): "The interim AI policy has been finalized as of October 2024 [1][2][3]."
 - 11/5 2:57 PM: "Is there an authorized AI system approved?"
 - 11/5 2:57 PM (AI generated): "As of October 2024, the only authorized AI system is Microsoft Copilot for Office 365 (paid license only) [1]."
 - 11/5 4:17 PM: "Thanks for your help!"
 - 11/5 4:17 PM (AI generated): "You're welcome."



Training ChatGPT

PrincipiAI - AI Policy Guide

Live · Anyone with a link

Updates pending

Share Update

Create Configure

+

Name

PrincipiAI - AI Policy Guide

Description

Educates employees on the company's new AI Policy.

Instructions

This GPT educates employees about the company's new AI Policy. It emphasizes that Principia encourages the use of AI for productivity, creativity, efficiency, clarity, simplification, and any way to enhance work. The GPT should clearly communicate the few restrictions implemented to reduce risks associated with this new technology. It must avoid having an opinion or making up answers, and should provide clear, concise, and accurate information based on the policy document and the FAQ

Conversation starters

- What are the key points of the new AI Policy?
- Can I use AI tools for personal projects?
- Am I allowed to upload sensitive data into AI tools?
- What should I do if I'm unsure about a policy detail?

Preview

What is the latest update date on the policy

The most recent update to Principia's organizational AI policy is dated August 5, 2024.

Is the policy finalized

No, the AI policy at Principia is currently an *interim* policy, indicating it may still undergo adjustment. technologies and best practices evolve. Principia has set up a framework for regular review and updates to ensure compliance with legal and regulatory standards as these co

PrincipiAI - AI Policy Guide

Educates employees on the company's new AI Policy.

GPT updated

- What are the key points of the new AI Policy?
- Can I use AI tools for personal projects?
- Am I allowed to upload sensitive data into AI tools?
- What should I do if I'm unsure about a policy detail?



Training ChatGPT by adding knowledge

Knowledge

If you upload files under Knowledge, conversations with your GPT may include file contents. Files can be downloaded when Code Interpreter is enabled



Frequently asked questio...
Document



Artificial Intelligence Inte...
Document

Upload files

Capabilities

- Web Search
- DALL-E Image Generation
- Code Interpreter & Data Analysis ?



Deploying ChatGPT

Share GPT ×

Only me

Anyone with the link

GPT Store

PrincipiAI - AI Policy Guide
By Kevin B Capp

[Copy link](#) [Save](#)



Comparing Results

“When was the AI Policy last updated and has it been finalized?”

Microsoft Copilot:

“The AI Policy was last updated on October 11, 2024, and it has been finalized [1].”

ChatGPT:

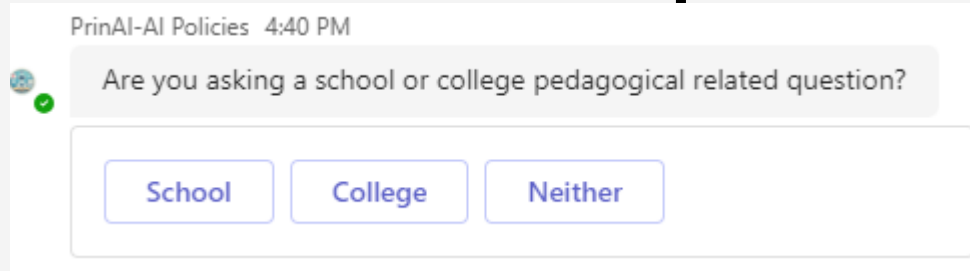
“The AI Policy was last updated on October 11, 2024, and the current version is marked as finalized.”



Comparing Results

“As a teacher, are my students allowed to use AI to help them with homework?”

Microsoft Copilot:



“Please refer to campus specific AI Pedagogical Policies for the School. At this time there isn't a link to those policies, so please contact the Head of School for further information.”

ChatGPT:

“Yes, students are generally allowed to use AI for educational purposes, including homework, but this use is regulated by specific campus policies...”



Comparing Results

“I work in the registrar's office, can I use Copilot AI to analyze student grades for trends?”

Microsoft Copilot:

“You can use Microsoft Copilot AI to analyze student grades for trends, but only if you are using the paid license version, as it is the only version authorized for use with sensitive data (1). Additionally, ensure that the analysis does not involve making high-impact decisions without thorough review to prevent bias (1).”

ChatGPT:

“Since you work in the registrar's office, using Microsoft Copilot (the authorized AI tool at Principia) for analyzing student grades would need careful consideration due to data sensitivity requirements...”



Comparing Results

“Am I allowed to make a personal errand in a Principia vehicle?”

Microsoft Copilot:

“Typically, using a Principia vehicle for personal errands is not allowed unless explicitly permitted by your organization's policies. It would be best to consult your organization's vehicle use policy or speak with your supervisor to get a definitive answer.”

ChatGPT:

“No, using a Principia vehicle for personal errands is not allowed. Principia vehicles are intended strictly for official, work-related activities. Personal use of these vehicles would fall outside of Principia’s policies on appropriate use of institutional resources...”

Questions?



Next Meeting

- ▶ 1st Q: late Jan/early Feb, Jake Burns, Independent Colleges of Indiana
- ▶ 2nd Q: TBD? Could this be YOU?

Follow-ups

- ▶ Everyone will receive a link to the recording, presentation and contact information for attendees.
- ▶ If you do not want your contact information shared, please let us know.
- ▶ Look for your monthly DAAHE newsletter in your inbox

Thank you for attending!

If you have feedback or suggestions, please let us know or email lnord@datatelligent.ai

