

AI Summit for Legal Aid Innovation in Delaware

Delaware Bar Foundation
Delaware State Bar Association
August 27, 2025

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AI translation: Greetings from MD



[Heygen translation](#)



Audience Poll – how much do you use AI?

					
0 – Never	1 – A tiny bit	2 – Monthly	3 – Weekly	4 – Daily	5 – I am AI
I don't even know how you get to the web page!	I asked it where I should go out to eat while I'm at the conference.	Every now and then I have an idea that I try.	I've started to consider how it can help with everything.	I use AI tools routinely, and tell others how they can.	I could reprogram ChatGPT to give number 4 a thumb!

Question 2: Do you currently pay to use AI tools?

Commercial Off-the-Shelf Tools

- Overview of user-friendly tools legal nonprofits can adopt immediately:
- - ChatGPT Team Workspace
- - Microsoft Copilot
- - Notebook LM
- - Zoom

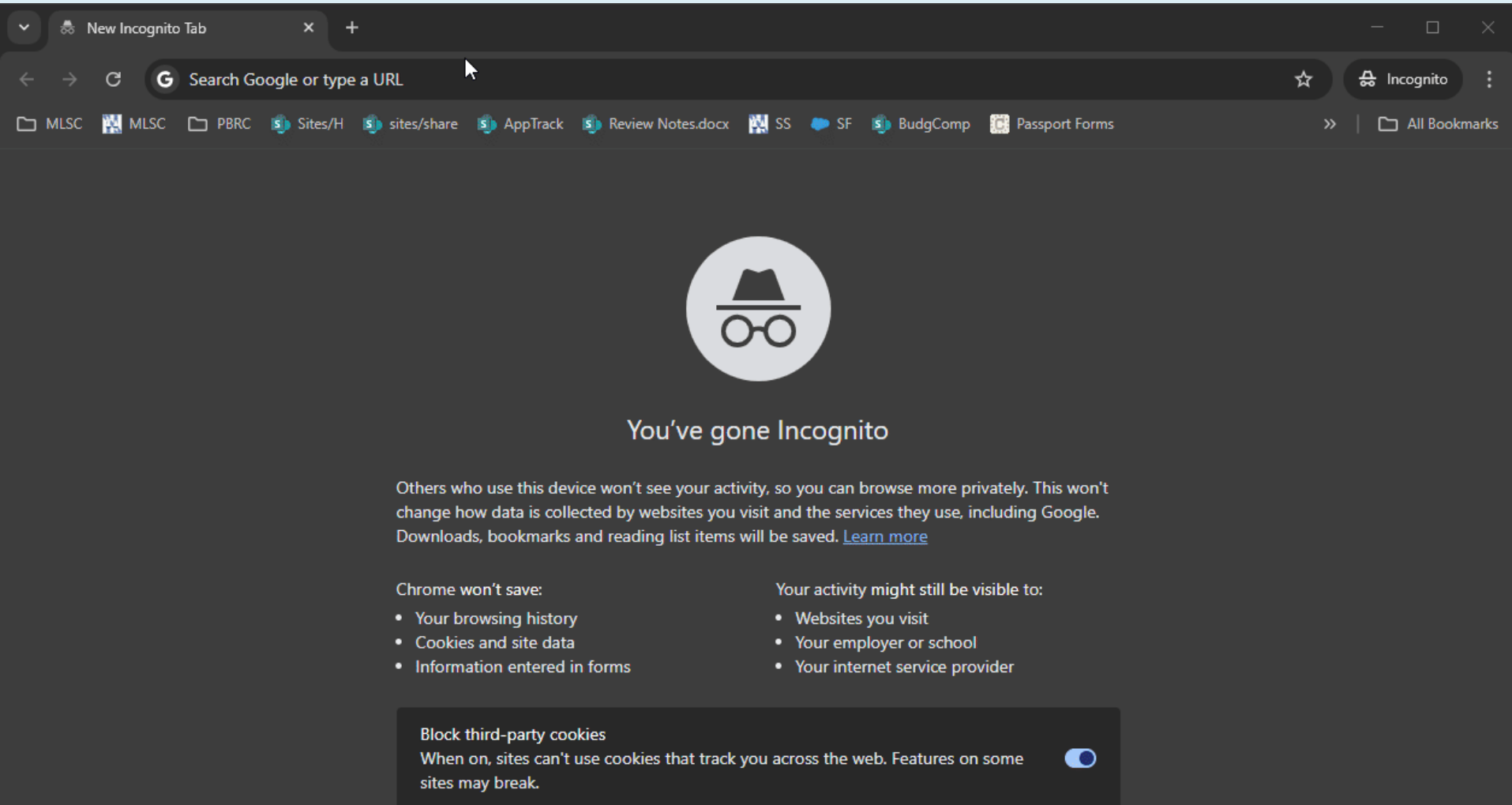


ChatGPT *Team Workspace* – What it is

- High end general chatbot, with significant optional features
- Build your own specialized chatbots (“GPTs”) with specific instructions and data/knowledge files
- Share chatbots within your team (or more broadly)
- Does not use workspace data to train its models

ChatGPT *Team Workspace* – Setting it up

1. Visit chat.openai.com

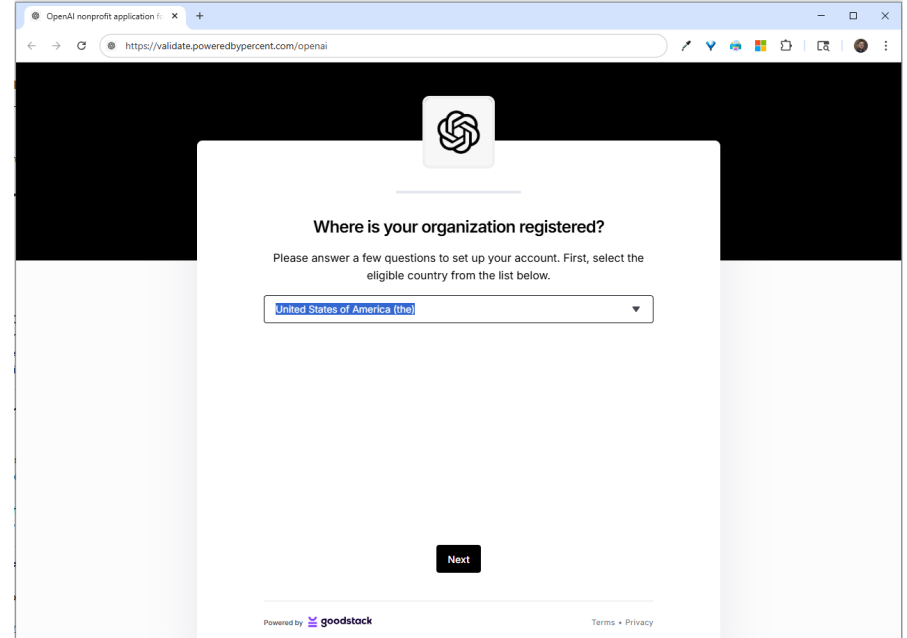


OpenAI for Nonprofits (discount)

<https://validate.poweredbypercent.com/openai>

What is OpenAI for Nonprofits?

OpenAI for Nonprofits is an initiative to enhance the accessibility of our tools for nonprofit organizations. Through OpenAI for Nonprofits, nonprofits can now access a 20% discount on ChatGPT Team (\$20 per month per user for the annual plan and \$24 per month per user for the monthly plan). Larger nonprofits ready for large-scale deployment can contact our sales team to access a 25% discount on ChatGPT Enterprise.



The screenshot shows a web browser window with the URL <https://validate.poweredbypercent.com/openai>. The page features the OpenAI logo at the top center. Below the logo, the heading "Where is your organization registered?" is displayed. Underneath, a subtext reads: "Please answer a few questions to set up your account. First, select the eligible country from the list below." A dropdown menu is shown with "United States of America (the)" selected. At the bottom of the form, there is a "Next" button. The footer of the page includes "Powered by goodstack" and "Terms • Privacy".

a. Use ChatGPT
(you can rejoin
an old chat later)

Choose your model
(Fast or thoughtful)

Pick your tools
(optional)

Upload documents
(optional)

Ask a question

b. Build and use
your own GPT

Give it a name and
specific
instructions

Upload persistent
“knowledge” files

Choose a default
model, capabilities,
and actions

Save; Share (or
not); Use and
reuse

Choose a “model”...

ChatGPT 5 Thinking ▾

GPT-5

Auto

Decides how long to think

Instant

Answers right away

Thinking

Thinks longer for better answers



Pro

Research-grade intelligence

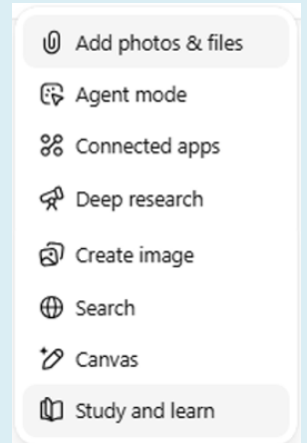
Legacy models



ChatGPT *Team Workspace* – Use Cases and Examples

1. Using the default ChatGPT tool

- a. First drafts of policies, letters, etc.
- b. Help with step-by-step problems and troubleshooting
- c. Image creation
- d. Upload document(s) and ask questions
- e. Deep research example




Choose any tools...

What can I help with?


+ /



 Add photos & files

 Agent mode


 Connected apps

 Deep research

 Create image

 Search

 Canvas

 Study and learn

Ask a question...

please summarize the following in 100 words. Focus on significant achievements:

I will upload a transcript of a Zoom call between me (Dave) and Casondra for MLSC on one side and [REDACTED] for [REDACTED] on the other side. Please give a brief narrative summary of what got understood, and what remains to be seen.

Can you help me create discussion questions and talking points to facilitate a meeting focused on this documents content? The context is an investment committee of a board of directors.

draft a short, friendly note to a grantee to tell them they were not selected for some extra funding

Subject: Update

Dear [Grantee's Name],

Thank you for your
thoughtful proposal.

Unfortunately, we
than we could accept.
hope to have other



Please don't hesitate

Best,
[Your Name]
[Your Organization]

please give me an excel formula. Cell A2 contains a name like "Doe, John". In the cell next to it (B2) I want the initials, like "D, J"

You can use the following formula in cell B2 to extract the initials from the name in A2:

excel

 Copy  Edit

```
=UPPER(LEFT(A2,1)) & ", " & UPPER(LEFT(MID(A2,FIND(" ",A2)+1,LEN(A2)),1))
```

Explanation:

1. `LEFT(A2,1)` gets the first character of the name (the first letter of the last name, assuming the format "Last, First").
2. `MID(A2,FIND(" ",A2)+1,LEN(A2))` extracts the first name portion by finding the space after the comma and extracting everything that follows.
3. `LEFT(MID(...),1)` gets the first letter of the first name.
4. `UPPER()` ensures both initials are in uppercase.
5. `& ", "` adds a comma and a space between the initials.

If you have a more complex scenario, such as names with middle initials or suffixes, let me know!



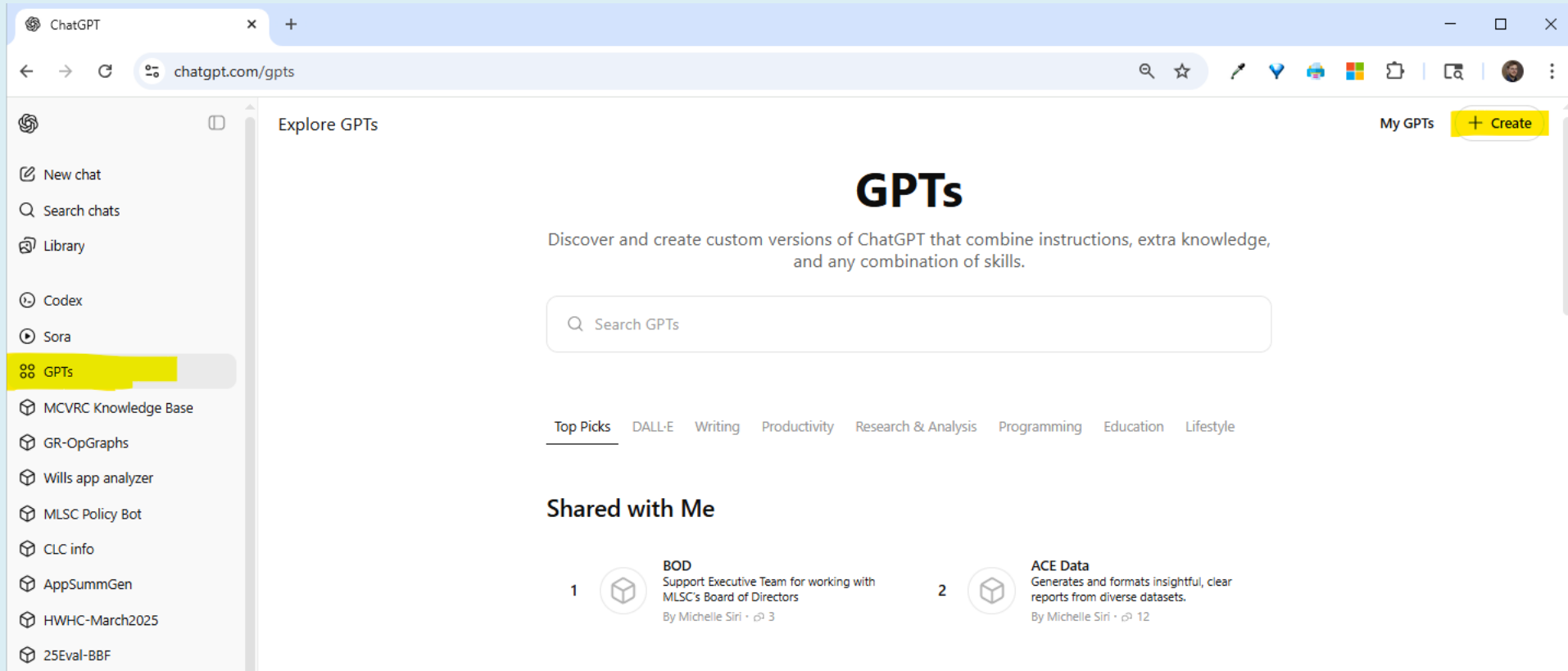
ChatGPT *Team Workspace* – Use Cases and Examples

2. Build an Internal knowledge base

Upload resources (e.g., directories, policies, laws, guidance documents, etc.) and when you get a tricky question, ask it!

ChatGPT *Team Workspace* – Setting it up

2. Creating the GPT



The screenshot shows the ChatGPT web interface at the URL `chatgpt.com/gpts`. The left sidebar contains a navigation menu with options: New chat, Search chats, Library, Codex, Sora, GPTs (highlighted), MCVRC Knowledge Base, GR-OpGraphs, Wills app analyzer, MLSC Policy Bot, CLC info, AppSummGen, HWHC-March2025, and 25Eval-BBF. The main content area is titled "Explore GPTs" and features a large "GPTs" heading. Below the heading is a description: "Discover and create custom versions of ChatGPT that combine instructions, extra knowledge, and any combination of skills." A search bar labeled "Search GPTs" is present. A horizontal menu of categories includes "Top Picks", "DALL-E", "Writing", "Productivity", "Research & Analysis", "Programming", "Education", and "Lifestyle". The "Shared with Me" section displays two GPTs: 1. "BOD" (Support Executive Team for working with MLSC's Board of Directors) by Michelle Siri, with 3 likes; 2. "ACE Data" (Generates and formats insightful, clear reports from diverse datasets) by Michelle Siri, with 12 likes.

ChatGPT

chatgpt.com/gpts

Explore GPTs

My GPTs [+ Create](#)

GPTs


Discover and create custom versions of ChatGPT that combine instructions, extra knowledge, and any combination of skills.

Search GPTs


Top Picks DALL-E Writing Productivity Research & Analysis Programming Education Lifestyle

Shared with Me

1

**BOD**
Support Executive Team for working with MLSC's Board of Directors
By Michelle Siri · 3

2

**ACE Data**
Generates and formats insightful, clear reports from diverse datasets.
By Michelle Siri · 12

Create

Configure



Name

Name your GPT

Description

Add a short description about what this GPT does

Instructions

What does this GPT do? How does it behave? What should it avoid doing?



Conversations with your GPT can potentially include part or all of the instructions provided.

Conversation starters



Knowledge

Conversations with your GPT can potentially reveal part or all of the files uploaded.

Upload files

Recommended Model ?

Recommend a model to the user, which should be used by default for best results.

No Recommended Model - Users will use any model they prefer



Capabilities

- ☒ Web Search
- ☒ Canvas
- ☒ Image Generation
- ☒ Code Interpreter & Data Analysis ?

Actions

Create new action

Preview

Model 5 Thinking ▼



+ Ask anything





Create

Configure



Name

MLSC Policy Bot

Description

This GPT holds copies of all MLSC policies and answers questions based on the policies

Instructions

This GPT holds copies of all MLSC policies and answers questions based on the policies

Conversations with your GPT can potentially include part or all of the instructions provided.

Conversation starters



Knowledge

Conversations with your GPT can potentially reveal part or all of the files uploaded.



MLSC Investment and Gra...
Document



MLSC Record Retention P...
Document



Conflict of Interest Policy...
Document



Computer Use Policy Rev...
Document



MLSC_AI_Acceptable_Use...
Document



Employee Manual Rev. 20...
PDF



MLSC Affidavit Policy.docx
Document



Grantee PIP Policy.docx
Document



Challenge Grant Policy.do...
Document



Limited Affidavit Waiver ...
Document



MLSC Fee Generating Cas...
PDF



MLSC Budget Variance & ...
Document



Emergency Grants - Jan 2...
Document



Geographic Eligibility for ...
Document



MLSC Grantee Complaint...
Document



MLSC Denial of Refundin...
Document



MLSC Glossary - July 202...
PDF



FY26 Guidelines for Grant...
Document

Upload files

Preview

Model 5 ▾

Under MLSC policies, please share the best argument for and against allowing a grantee to report a closed case without having a client affidavit of eligibility, citing to any policies you consider?

Here's the best policy-based argument **for** and **against** allowing a grantee to report a closed case without a client affidavit of eligibility:

Argument Against Allowing Reporting Without Affidavit

- **Affidavits are a statutory requirement.** Under §11-602 of the MLSC Act, *"Each application for legal assistance shall be in writing and accompanied by an affidavit stating that the information contained in the application is true and correct"*. This makes the affidavit not just a policy preference but a statutory mandate.
- **Audit and compliance risk.** Grantees must maintain applications and affidavits in their files for programmatic audits. Reporting a case without an affidavit risks findings of deficiency in audits, undermining financial accountability.
- **Eligibility verification.** The affidavit affirms the truthfulness of financial eligibility information. Without it, MLSC cannot e
required under
- **Slippery slope** client-signed a
reporting witho
remote counse
inconsistent sta

In short: Reporting
and exposing grant

Argument For Allowing Reporting Without Affidavit

- **MLSC recognizes limited exceptions.** The *Limited Affidavit Waiver Policy* allows certain closed cases to be reported without affidavits if specific conditic ↓ apply (remote brief advice, external placement, or counseling with exceptions for disability, safety concerns, or lack of address/technology). This

+ Ask anything



ChatGPT *Team Workspace* – Use Cases and Examples

2. Speedy or repeated analysis of formatted documents for specific question

Example: *A chatbot to review organizational financial audits.*

I will upload a PDF of a financial audit for a nonprofit. Please review each page of the audit and then provide a summary of information that I need to be aware of. Focus on any red flags or risks.

After doing this, please separately indicate, for the present year and the prior year, the following tests, placing them in a table: Current ratio; Quick ratio; Debt to Assets Ratio; General Administration-Fundraising Cost Ratio.

Please also calculate the change in net assets; and state the number of months of liquidity.



Financial Audit Review Tool

By Dave Pantzer 8

Ask anything



ChatGPT ***Team Workspace*** – Natural Language Coding

Natural language coding – tell the computer in plain language what you want it to do

The GPT will prompt the user to upload the first report. The GPT will prompt the user to upload further reports, one by one, until the user replies, "done" instead of uploading a report.

The GPT will then prompt the user with this menu: "[N]-Narrative; [S]-Statistics; [F]-Final Summary; [A]-Ask me; [D]-Done" and await the corresponding response (Either N, S, F, A, or D). A

If the user enters N, the GPT will provide a brief summary of the narrative portions of the reports that were uploaded.

If the user enters S, the GPT will provide a brief summary of the statistical portions of the reports that were uploaded.

If the user enters F, the GPT will provide a very brief summary of the state of the program, based on the complete picture that emerges from all the uploaded reports.

If the user enters A, the GPT will say, "Ask your question..." and await the user's question. The GPT will then answer the question based on the relevant portions of the relevant reports. The GPT will then return to the main N, S, F, A, D prompt.

If the user enters D, the GPT will thank the user for their input and ask if they want the N, S, F, S, D menu back or if they are really done.



General report synth 5 Instant v



General report synth

By Dave Pantzer

Each time this GPT is invoked, it uploads a set of PDF reports and then synthesizes the reports into a single, brief report on the status of that grant program.

+ Ask anything



ChatGPT can make mistakes. OpenAI doesn't use MLSC workspace data to train its models.

Sample Output

2. What challenges have the [GRANT PROGRAM] programs encountered this quarter?

Several recurring challenges were highlighted across the reports:

- **Attorney Recruitment Shortages:** [Grantee], [Grantee], and [Grantee] all pointed out difficulties in recruiting attorneys, particularly in rural or specialized areas. [Grantee] mentioned the need for attorneys with specific language skills, such as Amharic and Vietnamese, to serve growing immigrant populations. Similarly, [Grantee] struggled to place high-conflict cases due to limited attorney availability.
- **Attorney Burnout:** [Grantee] and [Grantee] expressed concerns about attorney burnout, especially as the same volunteers often handle multiple or more complex cases. [Grantee] reported similar issues, particularly in areas with fewer practicing family law attorneys.
- **Case Complexity:** [Grantee] and [Grantee] reported that cases are becoming more complex, leading to longer durations to close cases. This also ties into the challenge of attorney burnout, as volunteers are taking longer to resolve the cases they handle.

These challenges indicate a growing strain on resources, both in terms of attorney availability and their ability to manage increasingly complex caseloads.

ChatGPT *Team Workspace* – Building Data Visualization

Building Data Visualization (from Excel data)

BZ	CA	CB	CC	CD	CE	CF	CG	CH	CI	CJ	CK	CL	CM	CN	CO	CP	CQ	CR	CS	CT	CU	CV	CW
78	79	80	81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99	100	101
MLSC (Non-ML	All Brief Advice	MLSC (Non-ML	All Counseling	MLSC (Non-ML	All Negotiations	MLSC (Non-ML	All Document Preparation	MLSC (Non-ML	All Administrative Proceedings	MLSC (Non-ML	All Litigation	MLSC (Non-ML	All Other Remedies	MLSC (Non-ML	All Closed - Level								
90	77	167	0	0	0	0	0	0	0	0	0	193	126	319	11	18	29	0	0	0	294	221	515
2	2	4	1045	266	1311	0	0	0	51	1	52	638	226	864	88	6	94	0	0	0	1824	501	2325
111	137	248	30	15	45	0	0	0	2	0	2	0	0	0	32	14	46	0	0	0	175	166	341
9	54	63	48	45	93	0	0	0	0	0	0	0	0	0	75	60	135	3	10	13	135	169	304
16	42	58	0	0	0	0	0	0	0	0	0	0	0	0	28	50	78	0	0	0	44	92	136
20	56	76	13	35	48	5	1	6	7	5	12	1	0	1	2	0	2	0	4	4	48	101	149
1597	4904	6501	484	1860	2344	2	7	9	333	1009	1342	4	18	22	477	1856	2333	94	340	434	2991	9994	12985
0	0	0	35	332	367	0	1	1	1	8	9	0	0	0	5	53	58	0	0	0	41	394	435
882	606	1488	114	166	280	46	37	83	0	0	0	23	3	26	9	9	18	0	61	61	1074	882	1956
243	7	250	179	8	187	1	0	1	26	0	26	0	0	0	147	5	152	5	1	6	601	21	622
765	726	1491	148	142	290	0	0	0	49	47	96	0	0	0	44	43	87	0	0	0	1006	958	1964
27	246	273	15	64	79	0	1	1	0	1	1	0	0	0	55	154	209	1	12	13	98	478	576
7	29	36	29	124	153	7	31	38	0	1	1	15	65	80	106	449	555	0	0	0	164	699	863
94	62	156	97	38	135	0	0	0	0	0	0	0	0	0	46	20	66	0	0	0	237	120	357
176	46	222	1625	397	2022	0	0	0	0	0	0	0	0	0	321	120	441	0	29	29	2122	592	2714
3	9	12	8	13	21	0	0	0	0	0	0	0	0	0	134	0	134	1	190	191	146	212	358
51	470	521	5	38	43	0	0	0	0	3	3	6	6	12	22	72	94	2	11	13	86	600	686
9057	296	9353	348	37	385	140	8	148	566	38	604	165	20	185	1214	842	2056	58	4	62	11548	1245	12793
54	63	117	184	171	355	29	12	41	133	31	164	0	0	0	94	482	576	41	14	55	535	773	1308
0	3	3	0	6	6	3	0	3	0	0	0	0	0	0	34	199	233	0	0	0	37	208	245
453	52	505	916	97	1013	0	0	0	0	0	0	0	0	0	73	9	82	18	3	21	1460	161	1621
0	863	863	0	686	686	0	2	2	0	391	391	0	14	14	0	1395	1395	0	0	0	0	3351	3351
88	71	159	0	0	0	2	0	2	0	0	0	5	1	6	23	19	42	0	0	0	118	91	209
5	41	46	12	100	112	0	1	1	0	6	6	0	20	20	17	85	102	0	0	0	34	253	287
156	344	500	0	0	0	0	1	1	2	2	4	0	0	0	87	28	115	0	0	0	245	375	620
100	125	225	426	520	946	4	4	8	97	118	215	0	1	1	18	21	39	40	48	88	685	837	1522
14	193	207	0	0	0	10	141	151	0	0	0	0	0	0	19	258	277	73	1016	1089	116	1608	1724
345	106	451	26	3	29	5	1	6	162	62	224	0	0	0	0	0	0	0	0	0	538	172	710
70	3	73	14	2	16	0	0	0	0	0	0	6	13	19	3	4	7	0	0	0	93	22	115
3	16	19	3	4	7	0	0	0	5	19	24	2	0	2	5	0	5	0	0	0	18	39	57
0	0	0	13	96	109	2	20	22	40	477	517	5	13	18	0	0	0	0	0	0	60	606	666
6061	1120	7181	0	5	5	0	1	1	0	0	0	21	84	105	33	268	301	0	0	0	6115	1478	7593
0	0	0	38	177	215	0	0	0	0	0	0	53	115	168	0	0	0	0	0	0	91	292	383

FY21

FY22

FY23

FY24

Create

Configure

Name

Operating Grant Raw Data - askme

Description

Add a short description about what this GPT does

Instructions

The knowledge file for this GPT is a multi-sheet spreadsheet representing the raw data for several grantees. We will ask the GPT questions about trends, based on the information. Most of the sheets are for a certain year (for example, FY24 means fiscal year 2024). The GPT will respond to questions. For example, we will ask about trends of how many cases of a certain kind that a certain grantee has done over time. In general, we will ask about column one on each tab, under the heading "Organization." The data points we will ask about are

Conversation starters

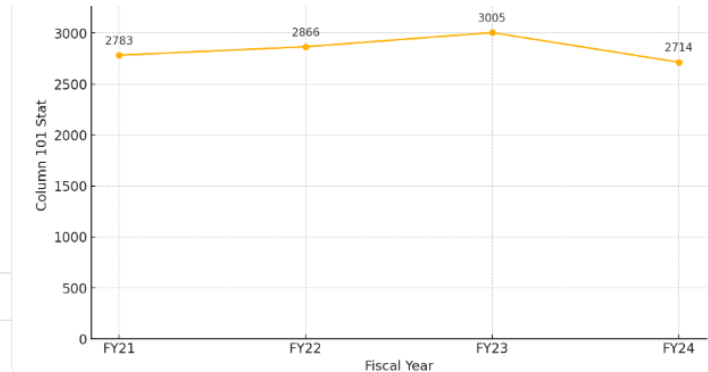
Knowledge

If you upload files under Knowledge, conversations with your GPT may include file contents. Files can be searched by the Code Interpreter if enabled

The following files are only available for Code Interpreter:

Dave.xlsx

Spreadsheet

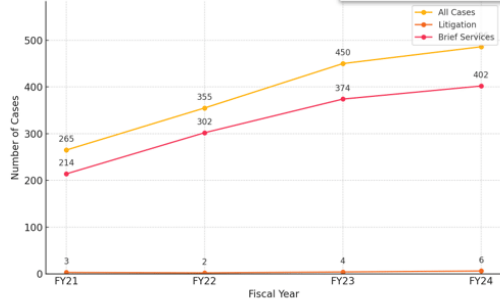


- Please provide a line chart plotting the number of "All Closed - Level" cases for << X>>, across the four years labeled FY21, FY22, FY23, and FY24
- please plot the stat in column CW over time for grantee "<< X>>"
- please include data labels for the nodes on the graph, so I can see the exact numbers
- please plot column 101 over time for << X>>, including data labels on the graph
- please adjust the scale of the y-axis, so that it starts at 0
- please adjust the y-axis to go to 20% higher than the highest point
- now please add in another line, in another color, for the data points in column 95. please label this series "Litigation"
- Please rename the Column 101 Stat series to All Cases
- Now please add in a line called Brief Services, which is the sum of the data points in columns 80 and 83
- can you please make this graph for each grantee and output them all into a big word document?

Operating Grant Data – FY21 to FY24

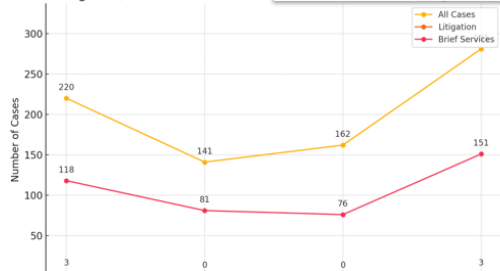
Grantee 1

Comparison of All Cases, Litigation, and Brief Services for [Redacted] (FY21-FY24)



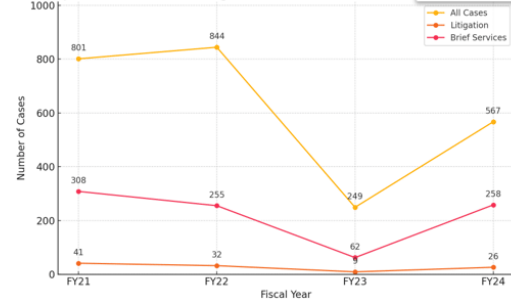
Grantee 2

Comparison of All Cases, Litigation, and Brief Services for [Redacted]



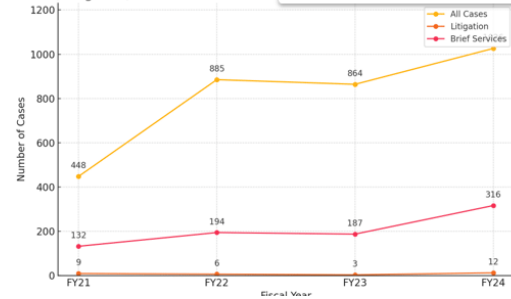
Grantee 3

Comparison of All Cases, Litigation, and Brief Services for [Redacted]



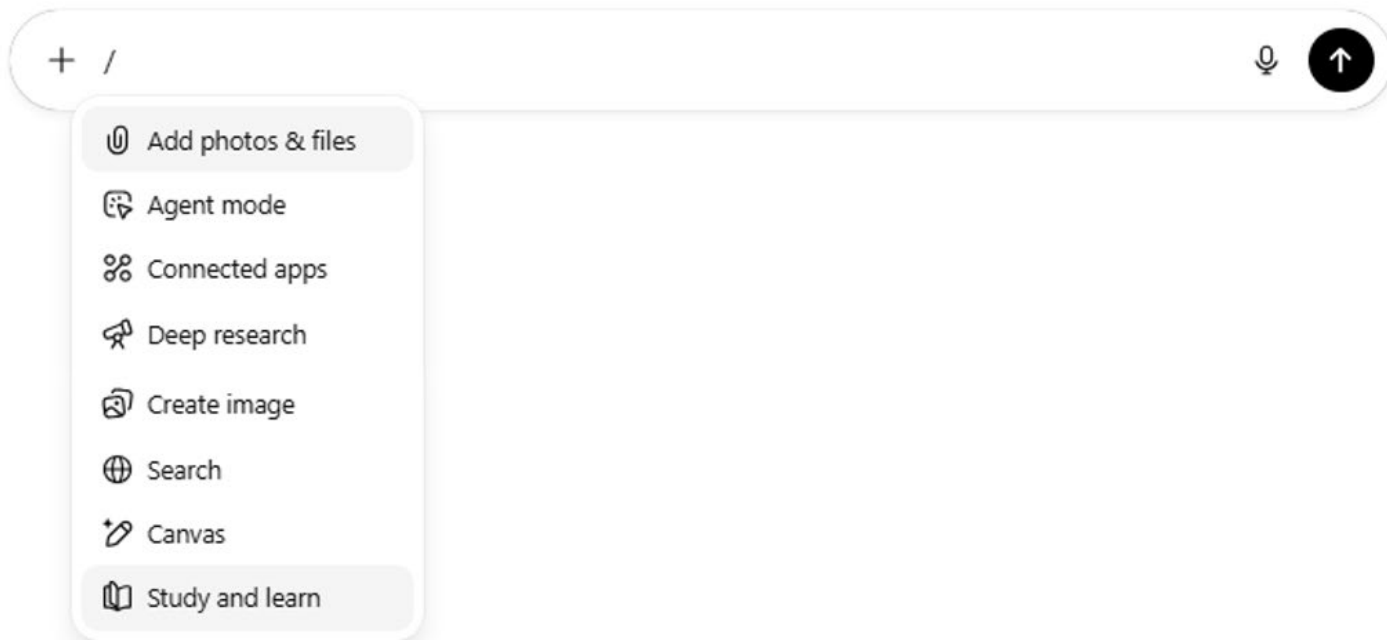
Grantee 4

Comparison of All Cases, Litigation, and Brief Services for [Redacted]



“Agent mode”

What can I help with?



What can I help with?

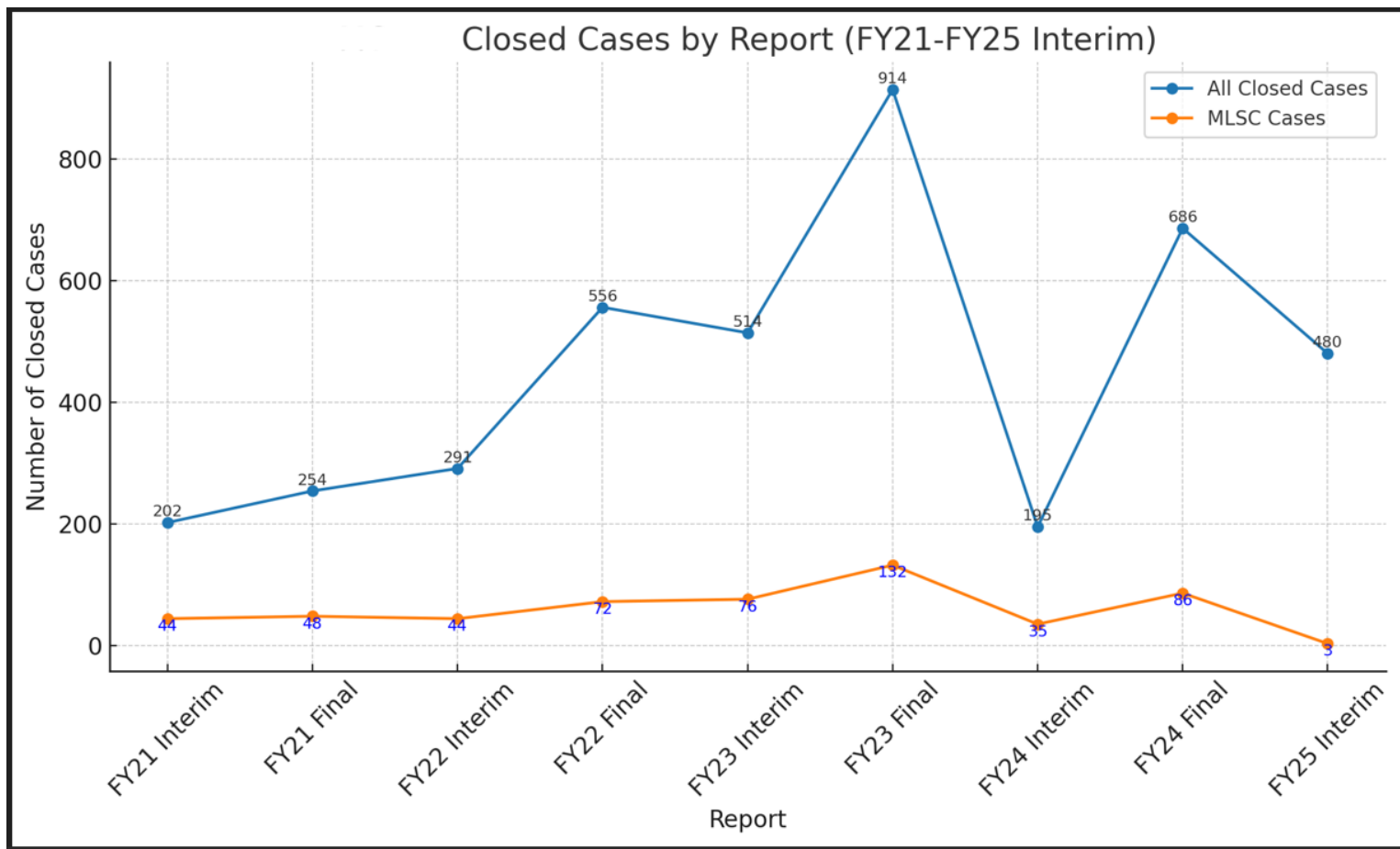
+ Ask anything

🎤

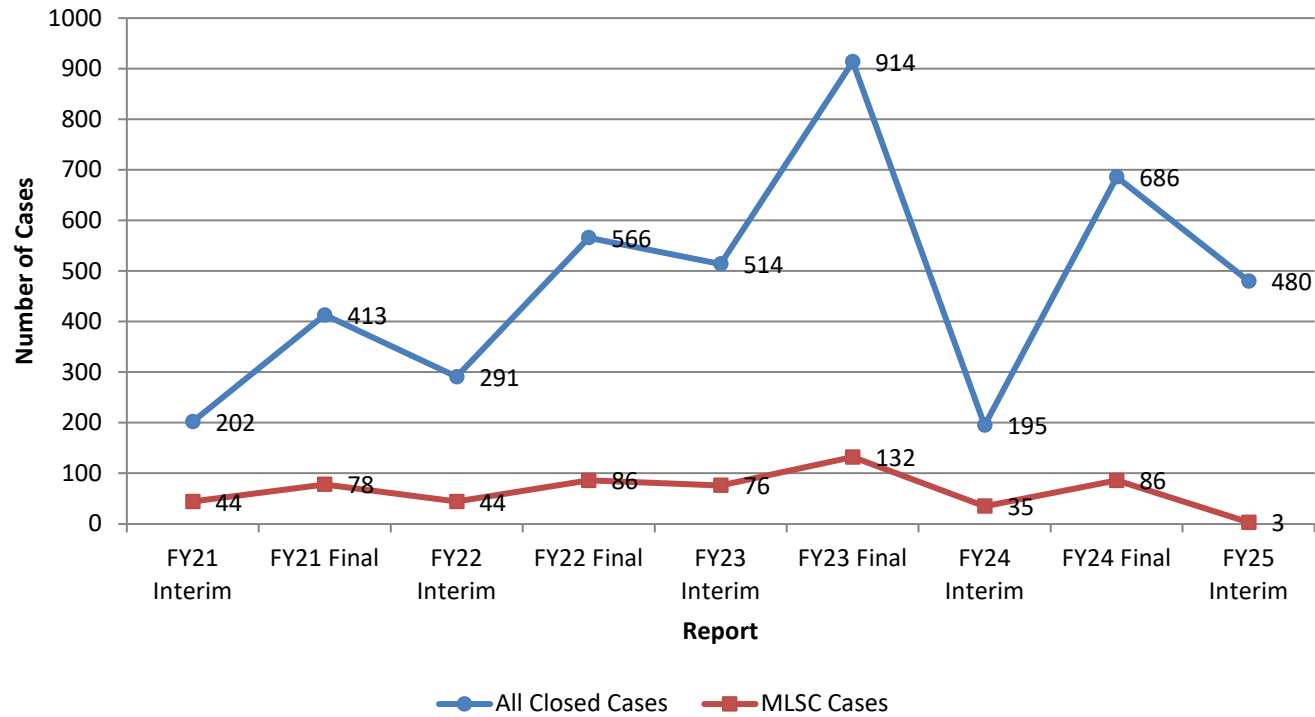
🔊

Background, Request, Scope/instructions, Formatting

i will give you the Fiscal Year 21, 22, 23, and 24 Interim and Final reports, as well as the FY25 interim report for our grantee ~~~~~. Each report has a section that breaks down the closed cases by level of service. (Consider the table called "Level of Service" not the table called "Level of Service and Service Provider." Consider each level of service, all the way down to the total.) Using excel, please prepare a line graph that plots the total closed cases (in the "All closed cases" column) as well as the number of total closed cases in the "MLSC cases" column. Please place numerical data labels at each node on the line graph. Start with the earliest year and go to the latest. Within each year, the interim report comes before the final report.



Total Closed Cases (All vs MLSC) by Report



Data Visualizations, starting from PDFs

Section 11-605 - Affordable Life, Wills, and Estate Planning for Seniors Grant Program

(f) The Program shall provide eligible clients with legal services concerning primarily:

- (1) last will and testaments;
- (2) powers of attorney;
- (3) special needs trusts;
- (4) advance health care directives; and
- (5) life estate deeds.

[illegible][illegible][illegible][illegible][illegible][illegible][illegible][illegible]

Important note: These tests are for use only on digital and there is a limit on the number of tests that can be performed at the same time. For more information, see the **FAQs** section.

AI Chat History **AI Chat**

Question	Answer of GPT-4o
What is the capital of France?	Paris
What is the capital of Germany?	Berlin
What is the capital of Italy?	Rome
What is the capital of Spain?	Madrid
What is the capital of the United Kingdom?	London
What is the capital of the United States?	Washington, D.C.
What is the capital of China?	Beijing
What is the capital of India?	New Delhi
What is the capital of Australia?	Canberra
What is the capital of Brazil?	Brasília
What is the capital of Russia?	Moscow
What is the capital of Japan?	Tokyo
What is the capital of South Korea?	Seoul
What is the capital of the Philippines?	Manila
What is the capital of Indonesia?	Jakarta
What is the capital of Thailand?	Bangkok
What is the capital of Vietnam?	Hanoi
What is the capital of Laos?	Vientiane
What is the capital of Cambodia?	Phnom Penh
What is the capital of Myanmar?	Nay Pyi Taw
What is the capital of Nepal?	Kathmandu
What is the capital of Bhutan?	Thimphu
What is the capital of Mongolia?	Ulaanbaatar
What is the capital of Kazakhstan?	Nur-Sultan
What is the capital of Kyrgyzstan?	Bishkek
What is the capital of Uzbekistan?	Tashkent
What is the capital of Turkmenistan?	Ashgabat
What is the capital of Tajikistan?	Dushanbe
What is the capital of Georgia?	Tbilisi
What is the capital of Armenia?	Yerevan
What is the capital of Azerbaijan?	Baku
What is the capital of Turkey?	Ankara
What is the capital of Greece?	Athens
What is the capital of Bulgaria?	Sofia
What is the capital of Romania?	Bucharest
What is the capital of Hungary?	Budapest
What is the capital of Poland?	Warsaw
What is the capital of Czech Republic?	Prague
What is the capital of Slovakia?	Bratislava
What is the capital of Austria?	Vienna
What is the capital of Switzerland?	Bern
What is the capital of Germany?	Berlin
What is the capital of France?	Paris
What is the capital of Italy?	Rome
What is the capital of Spain?	Madrid
What is the capital of the United Kingdom?	London
What is the capital of the United States?	Washington, D.C.
What is the capital of China?	Beijing
What is the capital of India?	New Delhi
What is the capital of Australia?	Canberra
What is the capital of Brazil?	Brasília
What is the capital of Russia?	Moscow
What is the capital of Japan?	Tokyo
What is the capital of South Korea?	Seoul
What is the capital of the Philippines?	Manila
What is the capital of Indonesia?	Jakarta
What is the capital of Thailand?	Bangkok
What is the capital of Vietnam?	Hanoi
What is the capital of Laos?	Vientiane
What is the capital of Cambodia?	Phnom Penh
What is the capital of Myanmar?	Nay Pyi Taw
What is the capital of Nepal?	Kathmandu
What is the capital of Bhutan?	Thimphu
What is the capital of Mongolia?	Ulaanbaatar
What is the capital of Kazakhstan?	Nur-Sultan
What is the capital of Kyrgyzstan?	Bishkek
What is the capital of Uzbekistan?	Tashkent
What is the capital of Turkmenistan?	Ashgabat
What is the capital of Tajikistan?	Dushanbe
What is the capital of Georgia?	Tbilisi
What is the capital of Armenia?	Yerevan
What is the capital of Azerbaijan?	Baku
What is the capital of Turkey?	Ankara
What is the capital of Greece?	Athens
What is the capital of Bulgaria?	Sofia
What is the capital of Romania?	Bucharest
What is the capital of Hungary?	Budapest
What is the capital of Poland?	Warsaw
What is the capital of Czech Republic?	Prague
What is the capital of Slovakia?	Bratislava
What is the capital of Austria?	Vienna
What is the capital of Switzerland?	Bern

AI Chat History **AI Chat**

What is the capital of France? Paris

What is the capital of Germany? Berlin

What is the capital of Italy? Rome

What is the capital of Spain? Madrid

What is the capital of the United Kingdom? London

What is the capital of the United States? Washington, D.C.

What is the capital of China? Beijing

What is the capital of India? New Delhi

What is the capital of Australia? Canberra

What is the capital of Brazil? Brasília

What is the capital of Russia? Moscow

What is the capital of Japan? Tokyo

What is the capital of South Korea? Seoul

What is the capital of the Philippines? Manila

What is the capital of Indonesia? Jakarta

What is the capital of Thailand? Bangkok

What is the capital of Vietnam? Hanoi

What is the capital of Laos? Vientiane

What is the capital of Cambodia? Phnom Penh

What is the capital of Myanmar? Nay Pyi Taw

What is the capital of Nepal? Kathmandu

What is the capital of Bhutan? Thimphu

What is the capital of Mongolia? Ulaanbaatar

What is the capital of Kazakhstan? Nur-Sultan

What is the capital of Kyrgyzstan? Bishkek

What is the capital of Uzbekistan? Tashkent

What is the capital of Turkmenistan? Ashgabat

What is the capital of Tajikistan? Dushanbe

What is the capital of Georgia? Tbilisi

What is the capital of Armenia? Yerevan

What is the capital of Azerbaijan? Baku

What is the capital of Turkey? Ankara

What is the capital of Greece? Athens

What is the capital of Bulgaria? Sofia

What is the capital of Romania? Bucharest

What is the capital of Hungary? Budapest

What is the capital of Poland? Warsaw

What is the capital of Czech Republic? Prague

What is the capital of Slovakia? Bratislava

What is the capital of Austria? Vienna

What is the capital of Switzerland? Bern

	2017	2016	2015
Assets	121	101	99
Cash and cash equivalents	10	10	10
Accounts receivable	10	10	10
Inventory	10	10	10
Other non-current assets	10	10	10
Total non-current assets	10	10	10
Liabilities	10	10	10
Accounts payable	10	10	10
Other non-current liabilities	10	10	10
Total non-current liabilities	10	10	10
Equity	10	10	10
Share capital	10	10	10
Reserves	10	10	10
Total equity	10	10	10

The above information is for illustrative purposes only and should not be used for financial reporting purposes. The above information is for illustrative purposes only and should not be used for financial reporting purposes.

[illegible]

Service Type (Document Created)

	Number of Cases
Last will and testament	19
Powers of attorney	6
Special needs trusts	0
Advance health care directives	4
Life estate deeds	4
Other Estate Planning Document	0
Total Cases Closed	33



ALFFY25Final_Report-2025-2191.pdf

PDF



BBFSLSFY25Final_Report-2025-2205.pdf

PDF



CivilJusticeFY25Final_Report-2025-219...

PDF



CLSPGCFY25Final_Report-2025-2195.pdf

PDF



HCBFFY25Final_Report-2025-2178.pdf

PDF



MVLSFY25Final_Report-2025-2188.pdf

PDF



PBRCFY25Final_Report-2025-2207.pdf

PDF

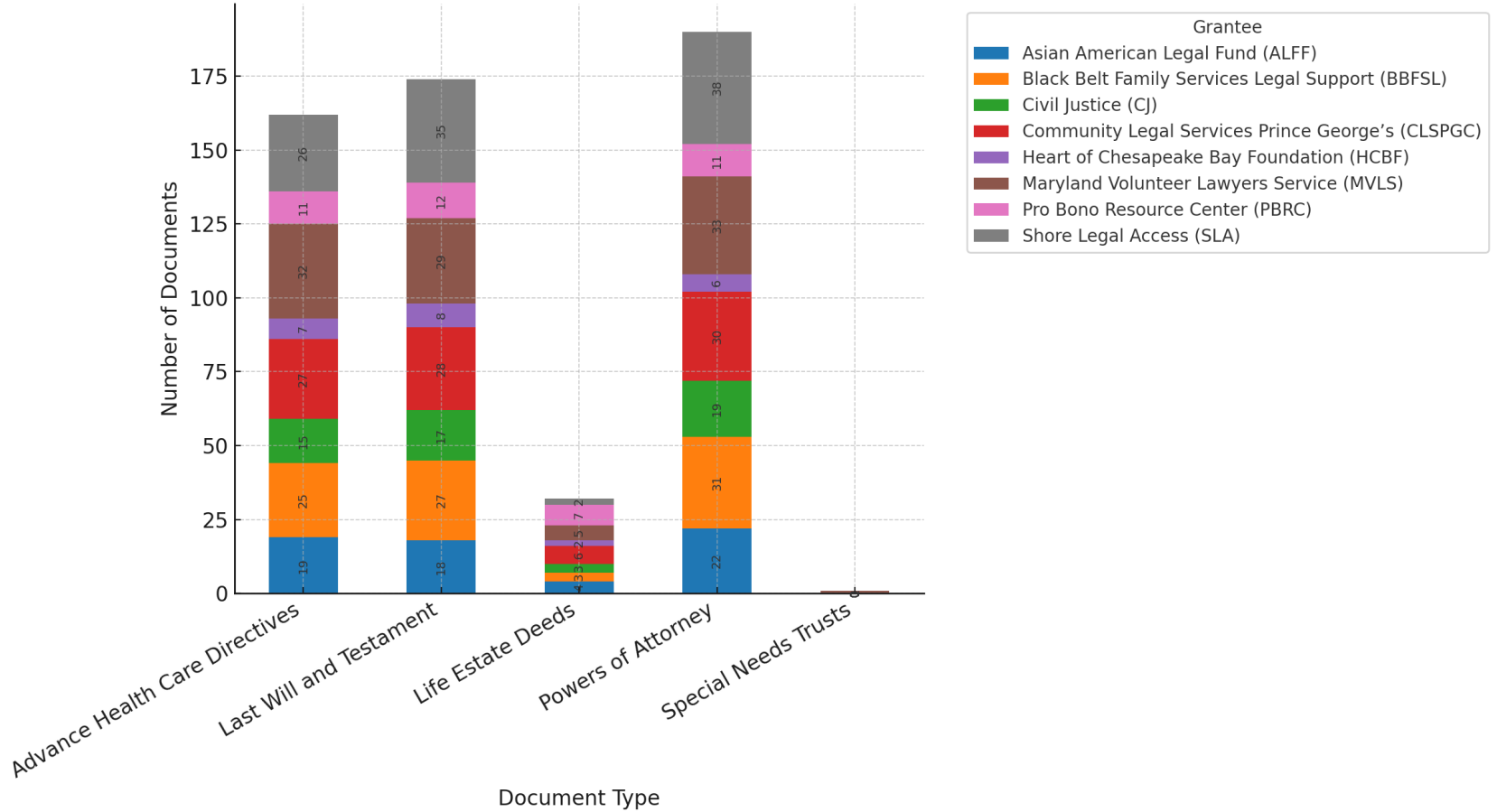


SLAFY25Final_Report-2025-2187.pdf

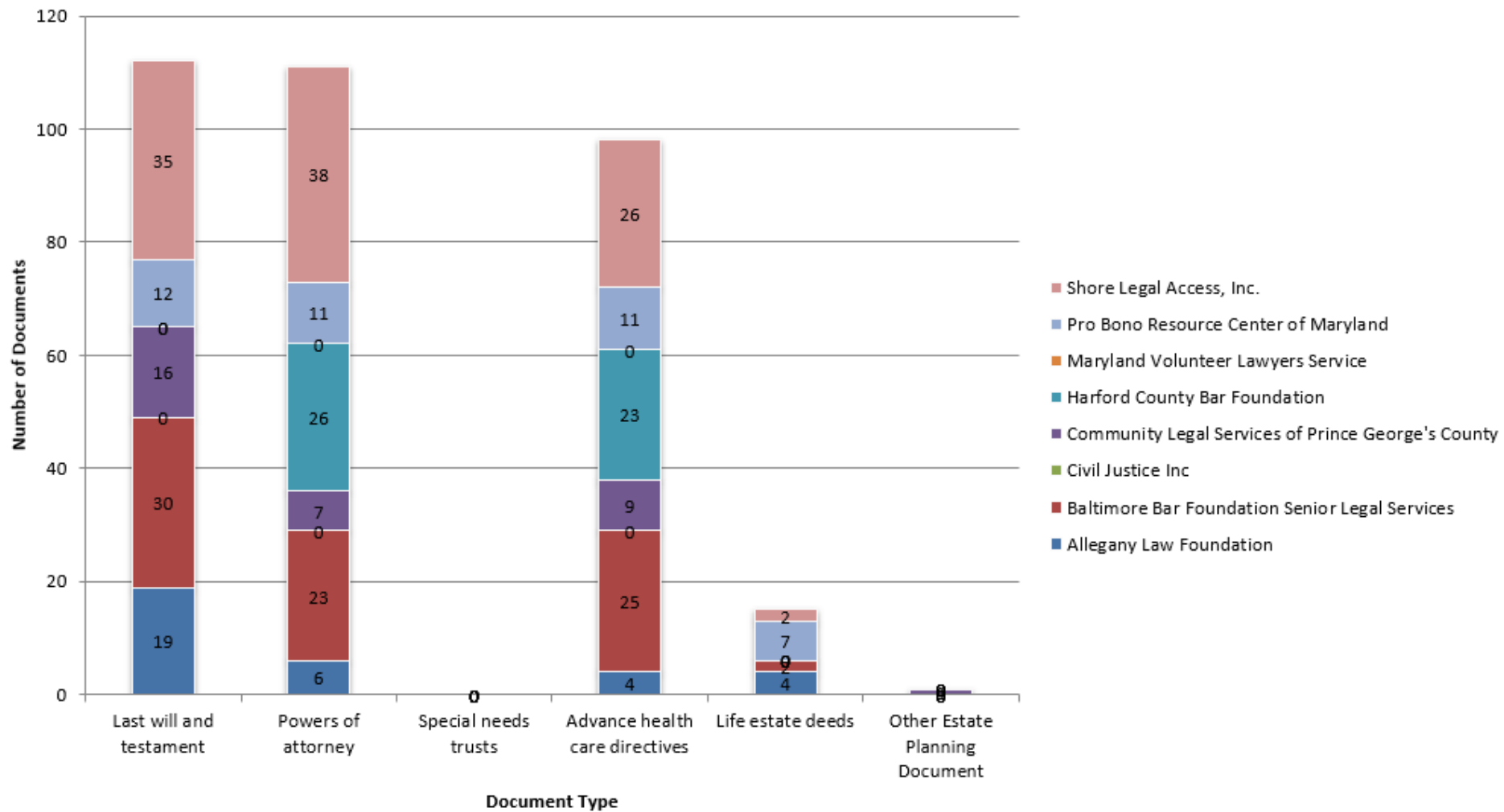
PDF

i will give you the Final reports of eight grantees for a legal services grant that provides seniors with various sorts of estate planning documents. I want to better understand how many of each document type were provided and by which grantee. Please examine the "Service Type (Document Created)" table in each report and output a spreadsheet with a stacked colored bar graph. Each column should represent one of the document types, and within each column, there should be a colored layer representing the number of that document type provided by each grantee. Please include data labels.

Estate Planning Documents by Type and Grantee (FY25)



Estate Planning Documents by Document Type and Grantee



ChatGPT – Strategies

- Within its analysis, ask for citations to examples.
- Instead of relying on verbiage, ask it to identify themes.
- Build in visual verification aids, like numerical tags on graphs and charts.
- Use it as an assistant, to speed you up.
- It can produce output in MS Office format, not just text and images.
- Providing more context in your questions helps it produce more appropriate output.

Microsoft Copilot

- Integrated into Office tools:
- - Summarize Word docs
- - Draft emails and content
- - Analyze Excel data
- - Automate Teams and Outlook tasks

CoPilot in Excel

	A	B	C	D	E	F	G	H
1	County	2020	2021	2022	2023			
2	Allegany	2027	1765	1997	2002			
3	Anne Arundel	26884	22902	22001	29476			
4	Baltimore City	33213	28859	36597	39336			
5	Baltimore County	18343	22589	29958	30627			
6	Calvert	1944	2235	2453	2286			
7	Caroline	1051	925	1047	882			
8	Carroll	2258	1797	2297	2160			
9	Cecil	2300	2270	2439	2146			
10	Charles	4462	4408	4814	6520			
11	Dorchester	1041	923	1400	1263			
12	Frederick	7196	6858	9238	10095			
13	Garrett	531	515	549	524			
14	Harford	5679	5712	6107	6135			
15	Howard	4524	5178	5914	5594			
16	Kent	353	379	455	407			
17	Montgomery	16953	18470	25747	27735			
18	Prince George's	35523	29501	40595	46354			
19	Queen Anne's	894	818	747	787			
20	St. Mary's	2604	2893	3125	2822			
21	Somerset	1944	658	840	788			
22	Talbot	1161	1000	1100	910			
23	Washington	3457	3114	4311	4932			
24	Wicomico	4575	3855	5595	5654			
25	Worcester	1178	1087	1446	1299			
26								

Copilot (Preview)

Create formulas
Suggest a formula column

Understand
Summarize using PivotTables or charts

Apply color and formatting
Highlight all cells with [incomplete in red]

can you make a projection of each county's number for 2024?

Here's 1 formula column to review and insert:

2024 Projection
Projects the value for 2024 by using a linear forecast based on the data from 2020 to 2023 for each county.

`=FORECAST.LINEAR(2024,[@@2020]:[@@2023],{2020,2021,2022,2023})`

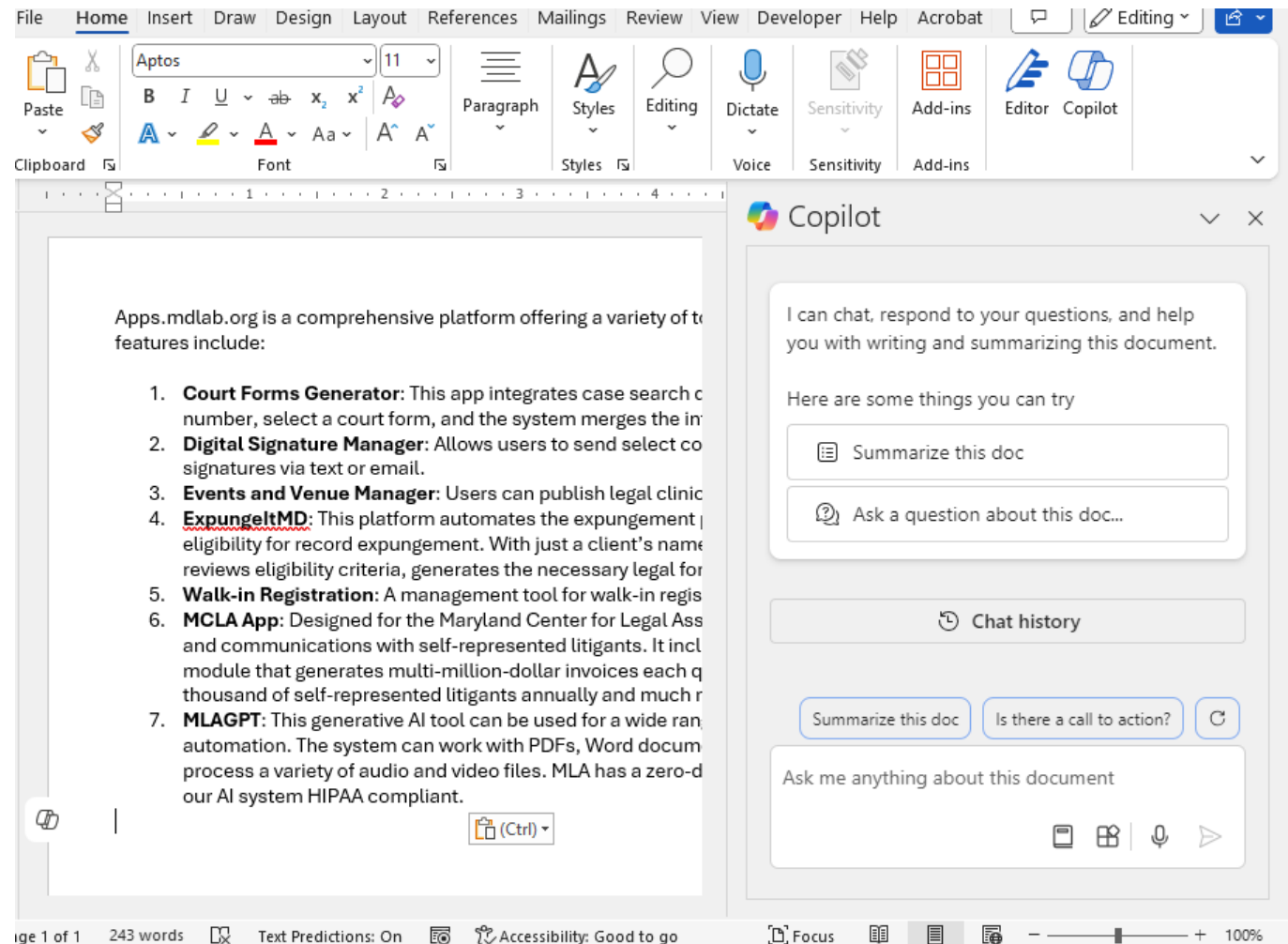
Show explanation

+ Insert column

AI-generated content may be incorrect

Copilot in Word

Summarize or
interrogate an
existing
document



Copilot in Word – editing “down”

Notes: MLSC will involve grantees in three phased groups.

- **Group 1:** 2-5 grantees – early adopters. These grantees will immediately test the first draft of the MLSC data template, to determine the extent to which they can immediately comply. This test and follow-up conversation determines the understandability and sufficiency of the template.
- **Group 2:** 5-8 grantees – broader cohort, representative of most grantee types, and willing to discuss. These grantees will review the template and discuss challenges they foresee. This conversation determines likely common challenges, and proposed basic frameworks for resolution.

Groups 1 and 2 will receive early access to technology grant funding (GA1) to facilitate resolutions to any reporting needs.

- **Group 3:** all remaining grantees.

All grantees will have access to technology grant finalized requirements.



Rewrite with Copilot

Visualize as a Table


Group	Number of Grantees	Description	Purpose	Grant Funding
Group 1	2-5	Early adopters	Test the first draft of the MLSC data template	GA1
Group 2	5-8	Broader cohort, representative of most grantee types	Review the template and discuss challenges	GA1
Group 3	All remaining grantees	All other grantees	Compliance with finalized requirements	GA2

Zoom

- Zoom AI Companion:
 - - Summarizes meetings
 - - Highlights key points and tasks
 - - Add-ons: Otter.ai, Notta for transcription and analysis

AI for better meetings

Zoom recording/transcribing/ translating features

 [Products](#) [Solutions](#) [Resources](#) [Plans & Pricing](#)

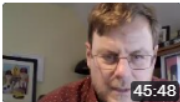
[Profile](#)
[Meetings](#)
[Webinars](#)
[Personal Contacts](#)
[Personal Devices](#)
[Whiteboards](#)
[Notes](#) **NEW**
[Surveys](#)
[Recordings](#)
[AI Companion](#)
[Clips](#) **NEW**
[Scheduler](#)

[Recordings](#) > [Maryland Legal Services AI Workgroup](#)

Maryland Legal Services AI Workgroup

May 8, 2024 03:01 PM Eastern Time (US and Canada) ID: 831 2542 4240





0 total views • 0 total downloads [Recording Analytics](#)

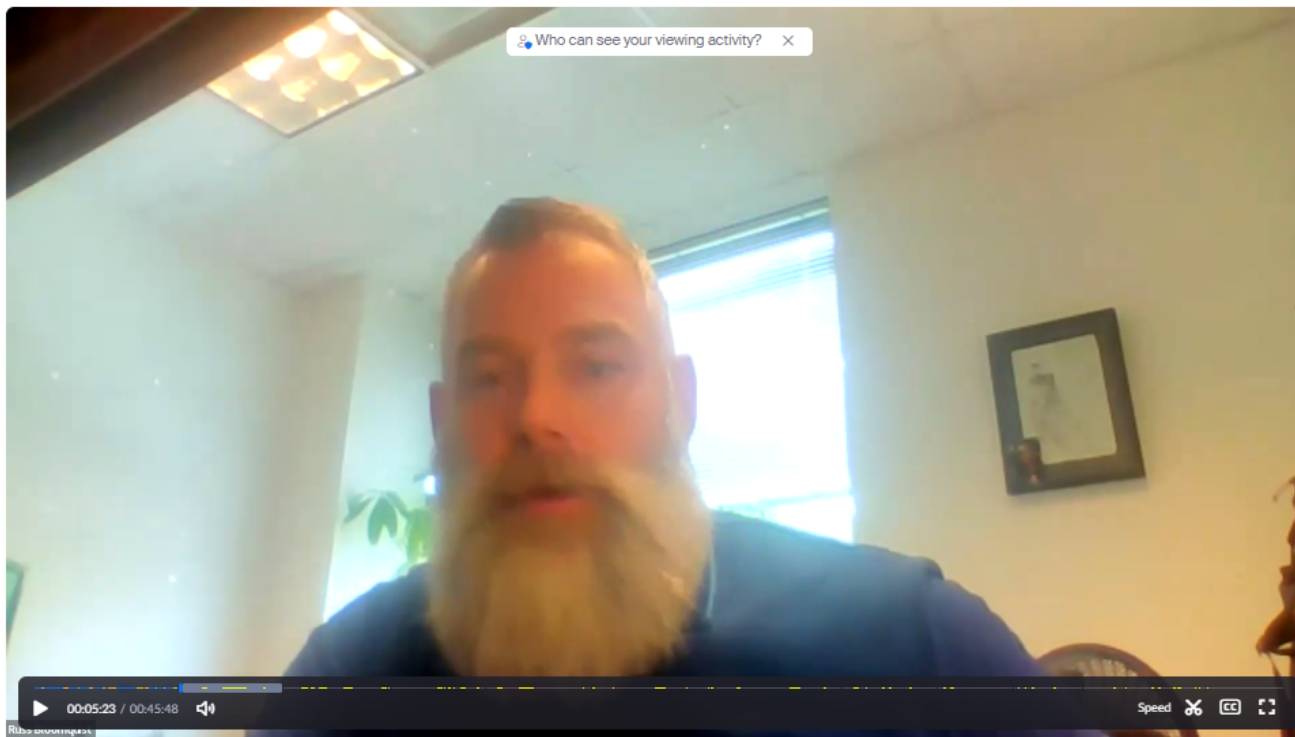
 **Recording 1**
4 Files 467 MB

[Download](#) [Copy shareable link](#) [Add to Zoom Clips](#) [Delete](#)

[Watch Highlights](#)

The recording includes the files listed below:

-  Shared screen with speaker view
-  Audio only
-  Audio transcript - English(original)
-  Chat file



Only play highlights

Edit Highlights

Save highlights

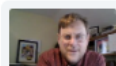
Summary and smart chapters

My meeting coach

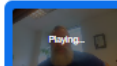
Summary

The team discussed the use of AI in recording and summarizing grantee meetings, the implementation of an API for OpenAI's text generator at Legal Aid, and the development of a chat bot for various purposes. They also explored the potential of combining various AI APIs, the use of AI for tasks such as rewriting letters and simplifying panel descriptions, and the challenges and potential solutions related to understanding and utilizing APIs. Lastly, they touched on topics related to voice technology, the weaponization of technology, and the use of Unreal Engine for creating AI and ... [View All](#)

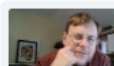
Smart Chapters



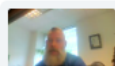
From 00:00
AI in Grantee
Meetings and...



From 05:14
Database
Credentials...



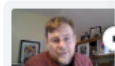
From 09:05
Chat Bot Costs
and Functionality...



From 13:02
Chat Application
Features and...



From 16:30
API Key System
Implementatio...



Database Credentials, Single Sign-On, Chat GPT API

Russ and Dave discussed the current database of credentials and the potential implementation of single sign-on in the future. They also talked about the use of the API for Chat GPT, which doesn't save any data for training and only holds user interaction data for 30 days. Russ mentioned that a 0 data retention policy is expected to be launched in June. Dave raised concerns about users potentially sharing confidential information, to which Russ responded that they have a prompt helper section in Chat GPT that advises against this. They concluded that while there's some concern, the current policy seems to be adequate for their use case.

Audio Transcript

Chat Messages

Search transcript

got it caged so that the the Si that the Llm. Can't learn from the prompts.



Russ Bloomquist 06:06

It cannot.

So yeah, using the Api for for Chat Gpt, it doesn't save any of your data for training, and it only according to their terms of use. It only saves their data on their server for a very short time, like 30 days.

Oh.



Dave Pantzer, MLSC 06:22

What, what does it save for 30 days.



Russ Bloomquist 06:24

Just anything that you're interacting with it for saved on their servers for 30 days, like the things that's generating and the inputs. But I believe in June, they're launching a 0 data retention policy with 5. So I think, starting in June, it will have a 0 data retention policy. So none of our data will be saved there at all.

[Resume autoscrolling](#)

Next Steps

1. Russ will share the link to the base version of the Chatbot he created for the team to explore and use as a starting point for their own projects.
2. Matthew will consider developing a publicly consumable version of the instructions he gave to his law students for their AI projects, to share with other teams and organizations.