



AI in Finance & Operations

Real-Life Use Cases, Tools & Efficiencies for Business & Operations Leaders

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Session Agenda & Learning Objectives

Objectives:

- See real-world AI use cases in finance, operations
- Learn proven prompt frameworks and tools (Gemini Pro, Custom GPTs, Grok, on-prem AI)
- Understand ethics, data privacy, financial impacts, and efficiency tools for leaders



Introductions

SPEAKERS:

Jim Wolf - *Director of Information Services,
School District U-46*

Frank Williams, EdD., CSBO - *Chief Financial Officer,
District 300*

Dean Romano, EdD., CSBO, SFO - *Assistant Superintendent for
Business & Operations, Lake Zurich CUSD 95*

MODERATOR:

Craig Williams, RCDD - *Director Infrastructure Consulting Services,
Client First Technology Consulting*



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The Rapid Evolution of Artificial Intelligence

- AI Started as a theoretical concept in the 1950s
- Original Intention:
To augment human intelligence and solve complex problems
- Recent Breakthroughs:
Explosive progress in the last 2–3 years
- Today:
AI is now deeply embedded in our daily work, creativity, and decision-making



From ambitious vision to powerful everyday tool... but at what cost?

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The Promise vs. The Reality



What we don't see can be as important as what we do see.

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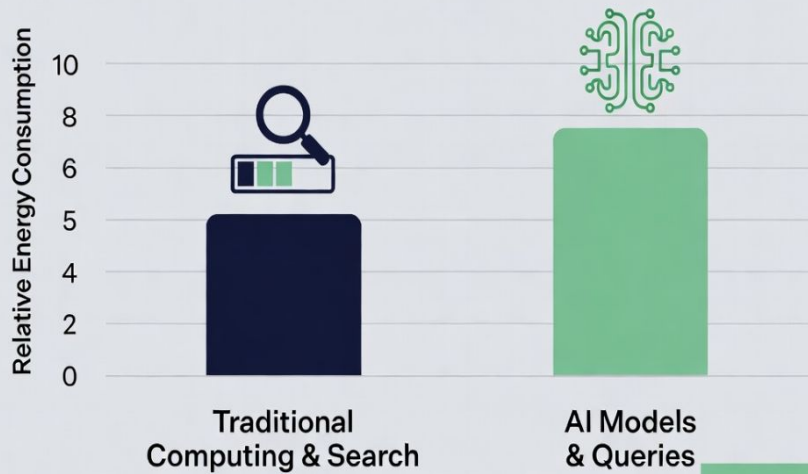
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AI's Hidden Cost: Energy and Digital Responsibility

Energy and AI

AI Can Consume 5-10x More Energy per Query



Energy Consumption: AI vs. Search

- Processing an AI query is significantly more "computationally expensive" than a standard search.
- The 5x Rule: On average, a single generative AI query (like Gemini or ChatGPT) consumes about 5 times more electricity than a standard Google search.
- Data Center Demand: By 2026, global data center electricity consumption is projected to exceed 1,000 terawatt-hours, nearly doubling since 2022.
- K-12 Takeaway: Encourage "Mindful Prompting." Use AI for complex synthesis or creative brainstorming but stick to traditional search for simple facts (e.g., "What time is it in London?").

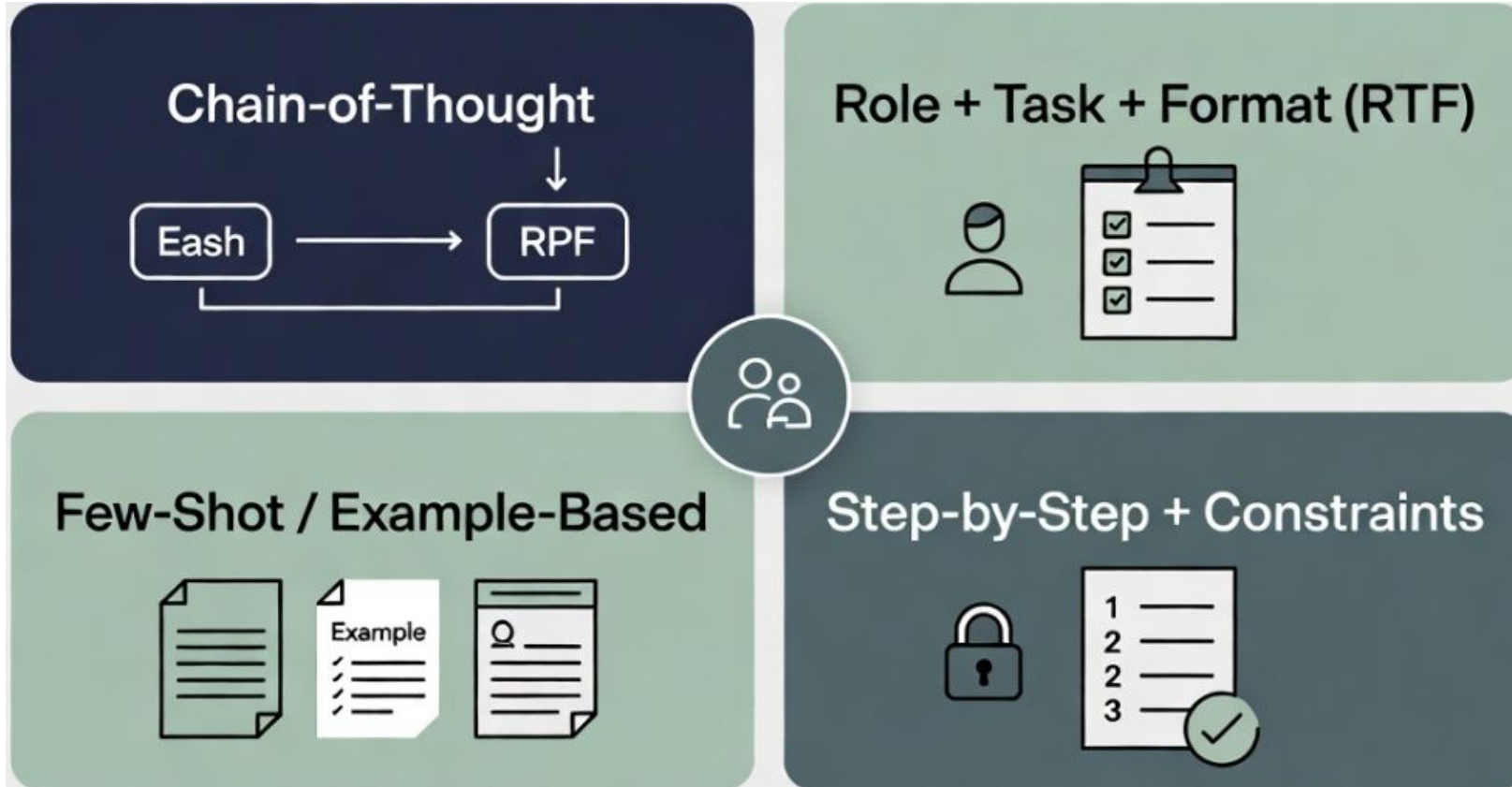
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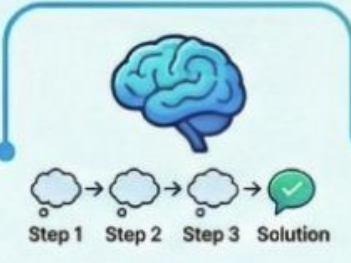
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Prompt Frameworks



From Novice to Pro: Advanced Prompt Engineering Techniques

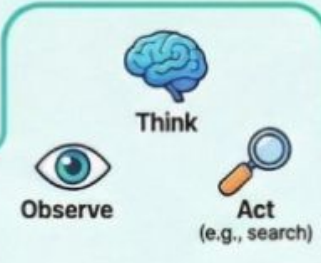
Advanced Reasoning Techniques



Chain-of-Thought (CoT)
Teach AI to "Think Step-by-Step".
Drastically improves accuracy on logic and math problems by showing reasoning.



Tree of Thoughts (ToT)
Explore Multiple Paths for the Best Solution.
The AI generates, evaluates, and selects from several different approaches.



ReAct
Combine Reasoning with Action in a Loop.
The AI thinks, takes an action (like a search), and observes the result.



Self-Consistency
Use a "Majority Vote" for Higher Accuracy.
Generate multiple answers and trust the most frequent one for reliable results.

Professional Prompting Workflows



System Prompts
Set a Persistent Persona and Rules.
Define the AI's role and behavior for an entire conversation.



Structured Outputs
Get Reliable, Machine-Readable Data.
Force the AI to provide consistent formats like JSON for use in applications.



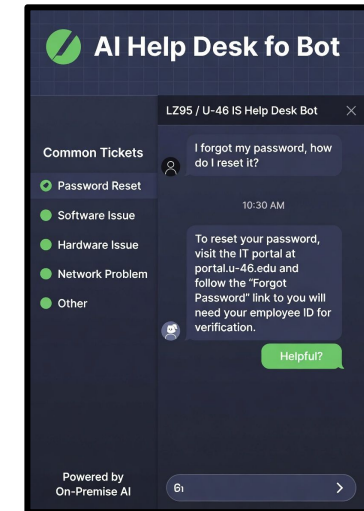
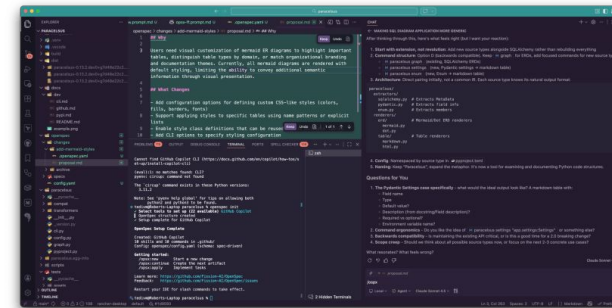
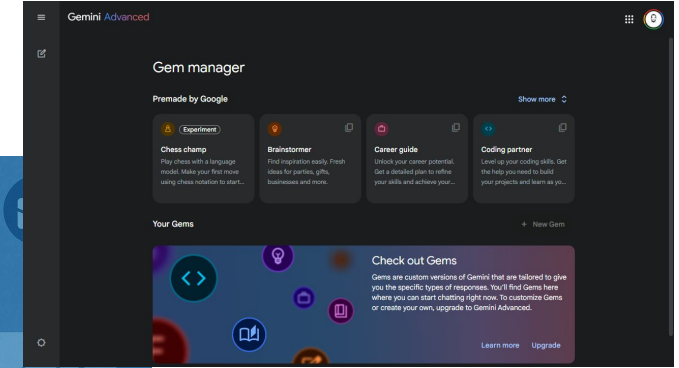
Prompt Chaining
Build Pipelines for Complex Tasks.
Break a large job into a sequence of smaller, specialized prompts.

Task Type	Best Technique	Why It Works
Math & Logic Problems	(CoT)	Follows a single, correct path.
Strategic Planning	(ToT)	Compares multiple valid options.
Research & Tool Use	(ReAct)	Needs to gather external info.

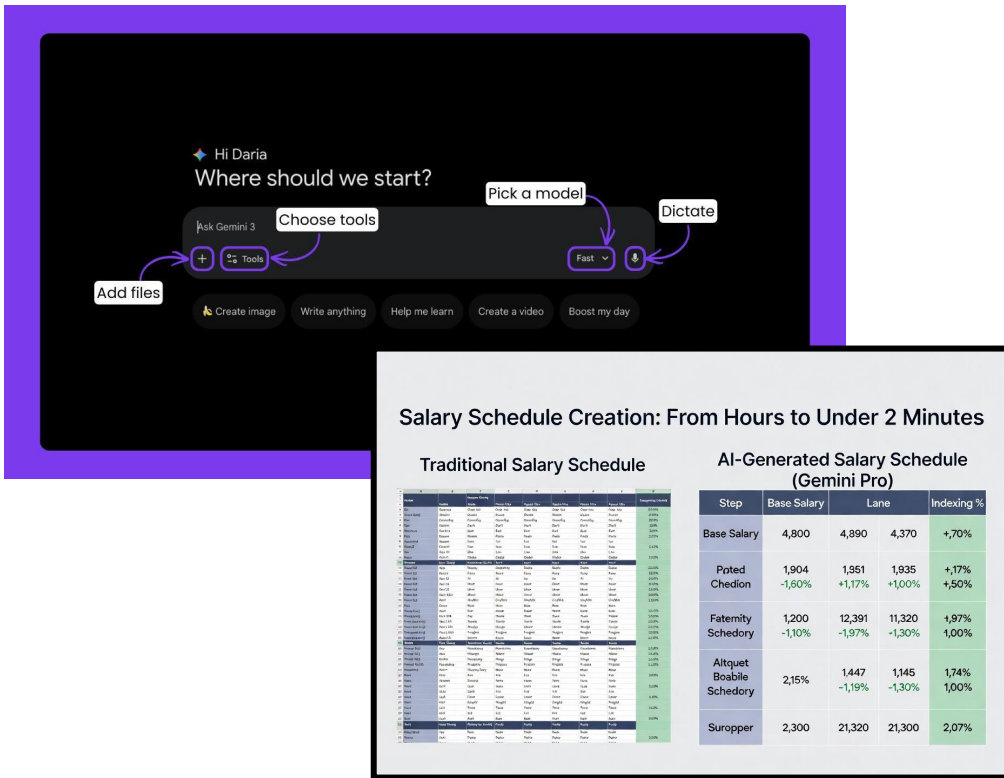


Use Cases – Jim Wolf

- Gemini Pro + “Gem” for BOE memos (style-matching from sample memos)
- RFP data extraction: winning vendor, # of RFPs, price ranges
- Programming & coding assistance
- On-premise AI Help Desk bot (currently in development for IS team)



Use Cases – Frank Williams



Hi Daria
Where should we start?

Pick a model
Dictate

Ask Gemini 3
Choose tools
Fast

Add files
Create image
Write anything
Help me learn
Create a video
Boost my day

Salary Schedule Creation: From Hours to Under 2 Minutes

Traditional Salary Schedule		AI-Generated Salary Schedule (Gemini Pro)			
Step	Base Salary	Step	Base Salary	Lane	Indexing %
Base Salary	4,800	4,890	4,370		+70%
Protet Chedion	1,904 -1,80%	1,861 +1,17%	1,835 +1,00%		+17% +50%
Faternity Schedory	1,200 -1,10%	12,391 -1,97%	11,320 -1,30%		+97% 1,00%
Altquet Boabile Schedory	2,15%	1,447 -1,19%	1,145 -1,30%		1,74% 1,00%
Suropper	2,300	21,320	21,300		2,07%

- Description + Interview Questions (AI-generated in <2 minutes) Bargaining support with Gemini Pro
- Salary Schedule creation: prompt → step/base/indexing
- Scattergram development for data visualization

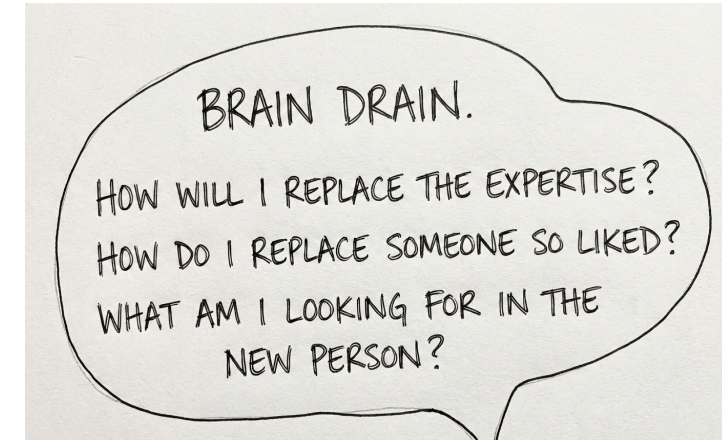
Use Cases – Job Descriptions



“You’re leaving.”

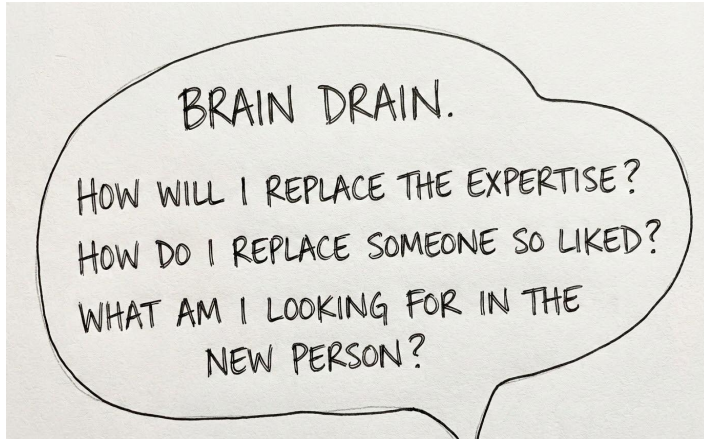


“What do I do now?”



“They’ve been here for so long!”

Use Cases – Job Descriptions



Community Unit School District 300 Job Description

Position Title: Director of Purchasing	
Work Days: 261/260	Employee Group: Administration
Reports To: Chief Financial Officer	Date of Preparation: December 2017

“They’ve been here for so long!”

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Use Cases – Job Descriptions

rewrite this position definition for a Director of Purchasing: Position definition: The Director of Purchasing develops, plans and implements purchasing goals and objectives; recommends and administers policies and procedures to procure goods and services at lowest, best, fair and reasonable price, in accordance with provisions, regulations, and restrictions as established by the Illinois School Code, School Board Policies, and Administrative Regulations. Records, monitors, classifies and reports all financial transactions of the District.

Review these duties and responsibilities to ensure there are no duplicate or similar points. If there are combine them into one: Key Duties and Responsibilities:

Thanks! now compare this to other IL school district Director of Purchasing/procurement job descriptions and report back any major differences that I should include.

Awesome! be sure to arrange the bullet points in similar duties.

Thanks! Do the same for Skills and Abilities: • Critical thinking skills to identify issues, develop solutions, and communicate resolutions effectively.

using this format write me a job description for a position that will be called Director of Support Operations. This position will manage the contract between the district and our transportation service and between the district and our food service. It will be similar to the Director of Support Operations at Indian Prairie


Using this same format create a job description for a Director of Operations - the person who oversees the facilities, grounds, and custodians.

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Use Cases – Job Descriptions



Community Unit School District 300 Job Description

+ Position Title: Director of Purchasing	
Work Days: 261/260	Employee Group: Administration
Reports To: Chief Financial Officer	Date of Preparation: November 2025

Position definition: The Director of Purchasing is responsible for developing, planning, and implementing the District's purchasing goals and objectives. This position oversees the administration of policies and procedures that ensure the efficient, ethical, and cost-effective procurement of goods and services at the best, fair, and reasonable value. The Director supervises the purchasing team, ensuring that all district purchases are executed in compliance with applicable laws, Board policies, and administrative regulations. Additionally, the Director is responsible for maintaining accurate, transparent, and auditable purchasing records for the District.

Key Duties, Responsibilities, and Knowledge

Procurement Oversight

- Manage all procurement processes, including invitations for bids, requests for proposals, quotations, vendor evaluations, contract drafting/negotiation, renewals, and amendments, in accordance with applicable laws and District policies.
- Develop, review, and revise bid specifications, public notices, and procurement documents to ensure competitive, transparent, and compliant purchasing practices.
- Review and approve purchase requisitions for accuracy, proper accounting/coding, and compliance with District requirements.
- Utilize cooperative or intergovernmental purchasing agreements when advantageous, ensuring compliance and achieving cost savings.
- Respond to emergency purchasing needs under established procedures.

Vendor & Contract Management

- Develop and maintain strong vendor relationships to ensure availability, quality, pricing, and timely delivery of supplies, equipment, and services.
- Evaluate bids, monitor market trends and supply-chain conditions, perform spend analysis, and recommend qualified vendors to achieve best value and meet District standards.
- Verify vendor compliance with insurance, licensing, and other required credentials; maintain vendor prequalification records.
- Administer the District's procurement card (P-Card) program, including issuance, controls, reconciliation, and training.

Compliance & Internal Controls

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Use Cases – Interview Questions



Director Of Support Operations - revis...
Document

Using the attached job description write 15 interview questions for a round 1. There should be five different categories of questions: getting to know you, general knowledge food service, general knowledge transportation, communicating with parents and management/leadership

write three questions about managing contracts

I need 6 scenario based questions.



Director of Facility & Operations revise...
Document

Using this attached job description write 10 interview questions

I want the questions to focus on the following areas: 1) managing a large operation with 212 employees, 30 buildings, 3.2 million sq feet, 561 acres 2) communication understanding when to communicate with the superintendent and when not to 3) construction and maintenance project management 4) vendor management 5) public speaking at board meetings 6) management and leadership

What are the look fors in this question: This position oversees 212 employees across 30 buildings totaling 3.2 million square feet and 561 acres. How would you structure leadership, accountability, and communication systems to effectively manage an operation of this size and scale?

This position oversees 212 employees across 30 buildings totaling 3.2 million square feet and 561 acres. How would you structure leadership, accountability, and communication systems to effectively manage an operation of this size and scale?

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Use Cases – Interview Questions

Director of Purchasing - Interview Questions - Round 1

Getting to Know You

Tell us about yourself and what makes you a good candidate to join our D300 team.

Illinois Procurement & Compliance (Knowledge-Based)

Explain the following, providing an example of when it is appropriate to use each one: Invitation to Bid, Request for Proposal, Request for Quote

Management Skills (Operations & Oversight)

Describe your experience managing purchasing staff or cross-functional teams.
How do you assign work, monitor progress, and ensure deadlines are met?

Leadership Skills (Communication & Judgment)

How do you communicate procurement requirements and limitations to departments that may be frustrated by timelines or regulations?

Project Management

Describe your experience managing procurement-related projects from planning through completion.

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Use Cases – Negotiations

2025-2026																		
New	A	B	C	D	E	F	G	H		New	A	B	C	D	E	F	G	H
1	\$19.51	\$20.69	\$21.93	\$23.24	\$24.63	\$27.09	\$33.18	\$36.50		1								
2	\$19.82	\$21.00	\$22.26	\$23.60	\$25.01	\$27.51	\$33.70	\$37.06		2	1.59%	1.50%	1.50%	1.55%	1.54%	1.55%	1.57%	1.53%
3	\$20.11	\$21.32	\$22.60	\$23.95	\$25.39	\$27.93	\$34.21	\$37.63		3	1.46%	1.52%	1.53%	1.48%	1.52%	1.53%	1.51%	1.54%
4	\$20.42	\$21.65	\$22.94	\$24.32	\$25.78	\$28.36	\$34.74	\$38.21		4	1.54%	1.55%	1.50%	1.54%	1.54%	1.54%	1.55%	1.54%
5	\$20.74	\$21.98	\$23.29	\$24.69	\$26.18	\$28.79	\$35.27	\$38.79		5	1.57%	1.52%	1.53%	1.52%	1.55%	1.52%	1.53%	1.52%
6	\$21.06	\$22.32	\$23.65	\$25.07	\$26.58	\$29.24	\$35.81	\$39.39		6	1.54%	1.55%	1.55%	1.54%	1.53%	1.56%	1.53%	1.55%
7	\$21.37	\$22.66	\$24.01	\$25.46	\$26.98	\$29.68	\$36.36	\$40.00		7	1.47%	1.52%	1.52%	1.56%	1.50%	1.50%	1.54%	1.55%
8	\$21.70	\$23.01	\$24.38	\$25.85	\$27.41	\$30.14	\$36.92	\$40.61		8	1.54%	1.54%	1.54%	1.53%	1.59%	1.55%	1.54%	1.53%
9	\$22.04	\$23.36	\$24.76	\$26.25	\$27.82	\$30.60	\$37.49	\$41.23		9	1.57%	1.52%	1.56%	1.55%	1.50%	1.53%	1.54%	1.53%
10	\$22.40	\$23.75	\$25.17	\$26.69	\$28.23	\$31.06	\$38.09	\$41.90		10	1.63%	1.67%	1.66%	1.68%	1.47%	1.50%	1.60%	1.63%
11	\$22.74	\$24.11	\$25.55	\$27.09	\$28.66	\$31.53	\$38.66	\$42.53		11	1.52%	1.52%	1.51%	1.50%	1.52%	1.51%	1.50%	1.50%
12	\$23.09	\$24.48	\$25.94	\$27.50	\$29.09	\$32.00	\$39.25	\$43.17		12	1.54%	1.53%	1.53%	1.51%	1.50%	1.49%	1.53%	1.50%

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Use Cases – Negotiations

2025-2026 ...x - Sheet1

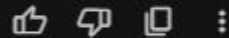
PDF PDF

using this as the base year - create a three year salary schedule - index each step at 2% - increase the base each year at 5%

Note on Calculations:

- **Step 1** for each year was calculated as $PreviousYearStep1 \times 1.05$.
- **Steps 2-25** were calculated as $PreviousStep \times 1.02$.
- All values have been rounded to the nearest cent.

Would you like me to generate a full CSV or Excel-ready table for all 25 steps across these three years?




yes

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Use Cases – Negotiations

Here is the complete three-year salary schedule with all 25 steps. These calculations are based on the 2025-2026 base year, with each year's **Step 1** increasing by 5% and each subsequent step indexed at 2%. 

Full 3-Year Salary Projection

Step	2026-2027 (A-H)	2027-2028 (A-H)	2028-2029 (A-H)
1	\$20.49, \$21.72, \$23.03, \$24.40, \$25.86, \$28.44, \$34.84, \$38.33	\$21.51, \$22.81, \$24.18, \$25.62, \$27.15, \$29.86, \$36.58, \$40.25	\$22.59, \$23.95, \$25.31, \$26.90, \$28.51, \$31.17, \$38.41, \$42.26
2	\$20.90, \$22.15, \$23.49, \$24.89, \$26.39, \$28.01	\$21.94, \$23.27, \$24.66, \$26.13, \$27.69, \$29.46	\$23.04, \$24.43, \$25.87, \$27.44, \$29.06, \$30.74

- Used this data to confirm my calculations
- Was able to generate tables very quickly and with ease

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Use Cases – Dean Romano



Custom GPT :

- **Basic Contract Review Tool**

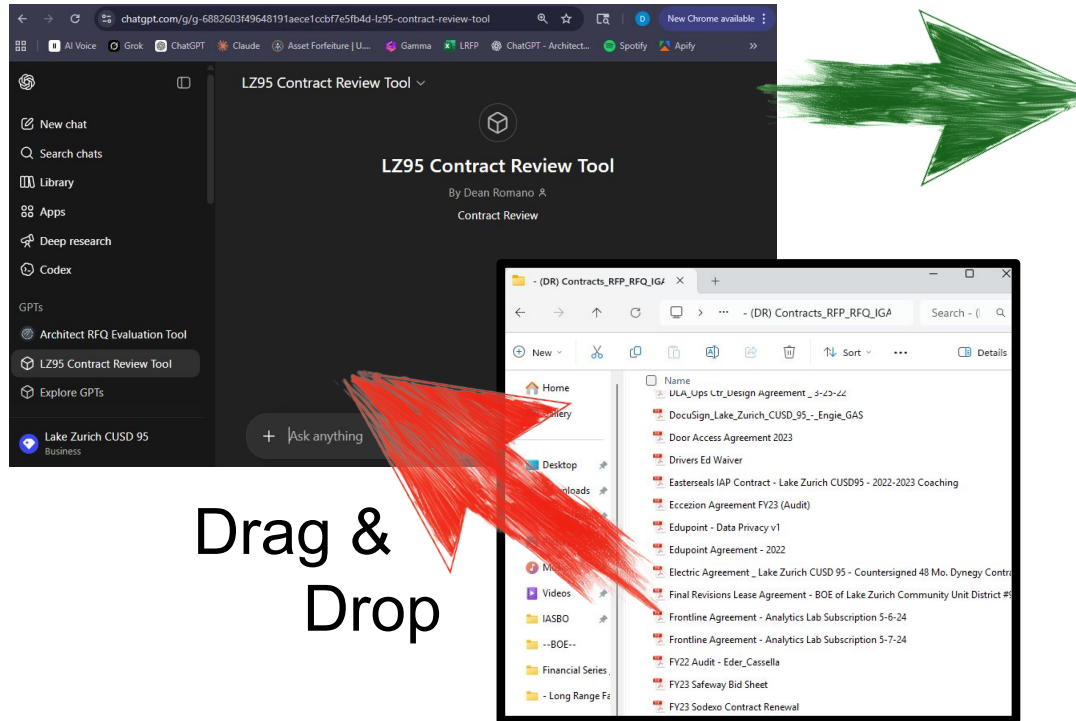
BOE Presentations

- **Audio & Video Imbedded**

Thought Partner

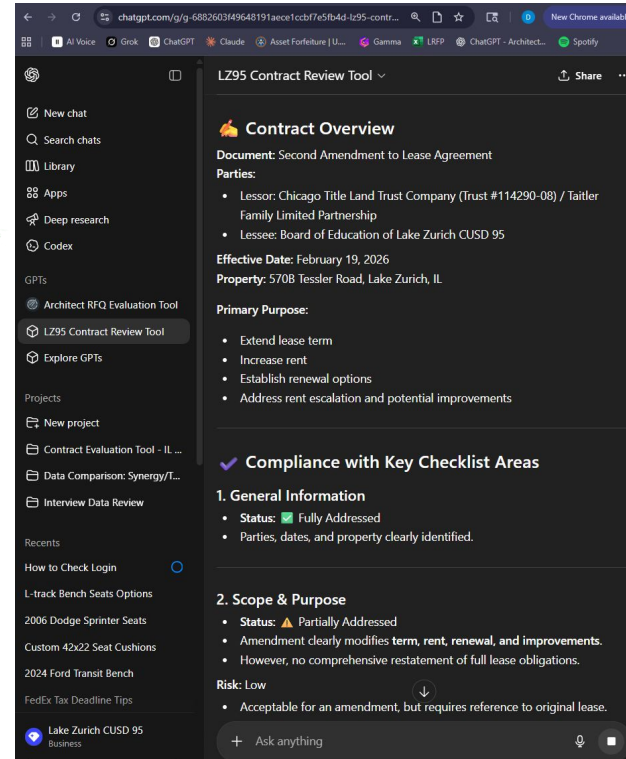
Use Cases – Contract Review Tool

Custom GPT : Basic Contract Review Tool:

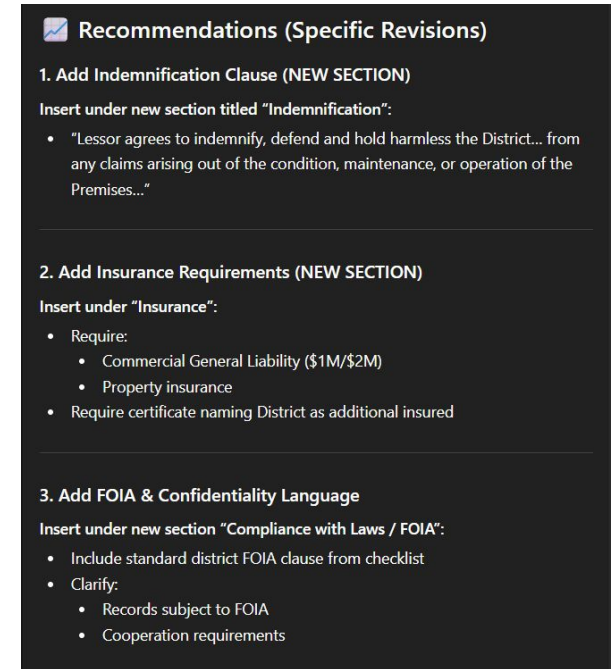


The screenshot shows the ChatGPT interface with a custom GPT named 'LZ95 Contract Review Tool' selected. A file explorer window is open, displaying a list of files. A red arrow points from the file explorer to the ChatGPT interface, indicating a drag-and-drop action.

Drag & Drop



The screenshot shows the ChatGPT interface displaying the results of the 'LZ95 Contract Review Tool'. The results are organized into sections: Contract Overview, Compliance with Key Checklist Areas, and Recommendations (Specific Revisions).



Recommendations (Specific Revisions)

- 1. Add Indemnification Clause (NEW SECTION)**
Insert under new section titled "Indemnification":
 - "Lessor agrees to indemnify, defend and hold harmless the District... from any claims arising out of the condition, maintenance, or operation of the Premises..."
- 2. Add Insurance Requirements (NEW SECTION)**
Insert under "Insurance":
 - Require:
 - Commercial General Liability (\$1M/\$2M)
 - Property insurance
 - Require certificate naming District as additional insured
- 3. Add FOIA & Confidentiality Language**
Insert under new section "Compliance with Laws / FOIA":
 - Include standard district FOIA clause from checklist
 - Clarify:
 - Records subject to FOIA
 - Cooperation requirements

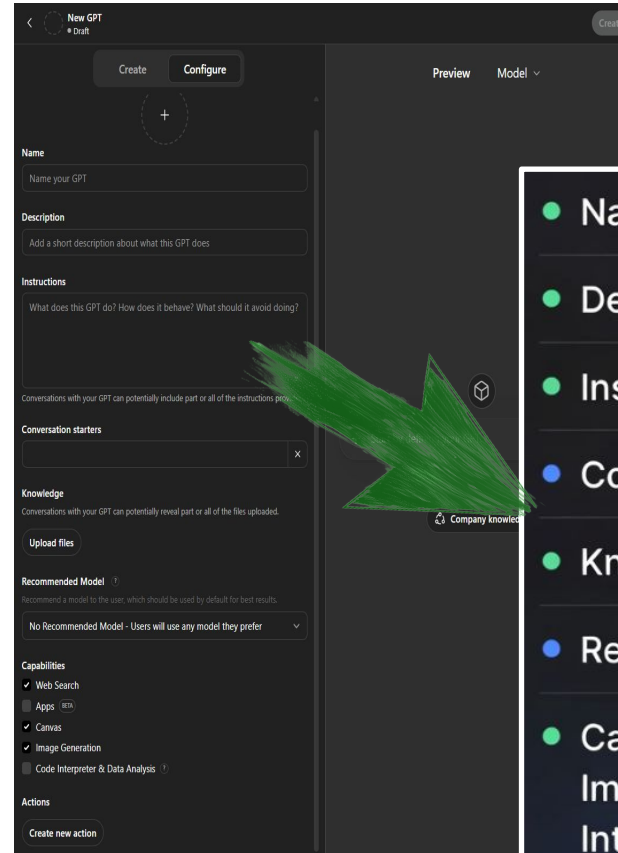
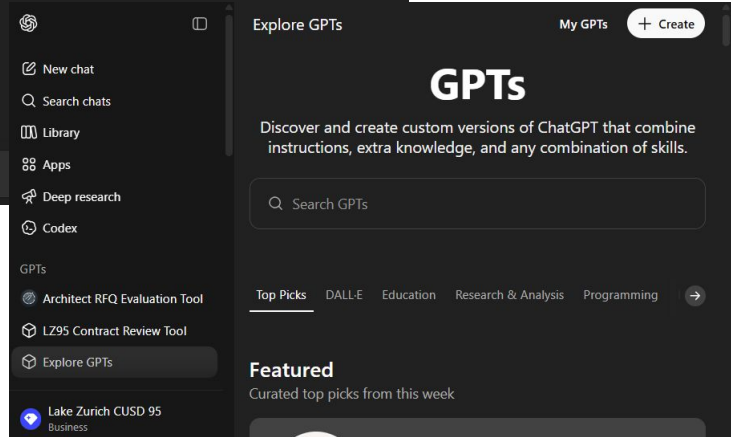
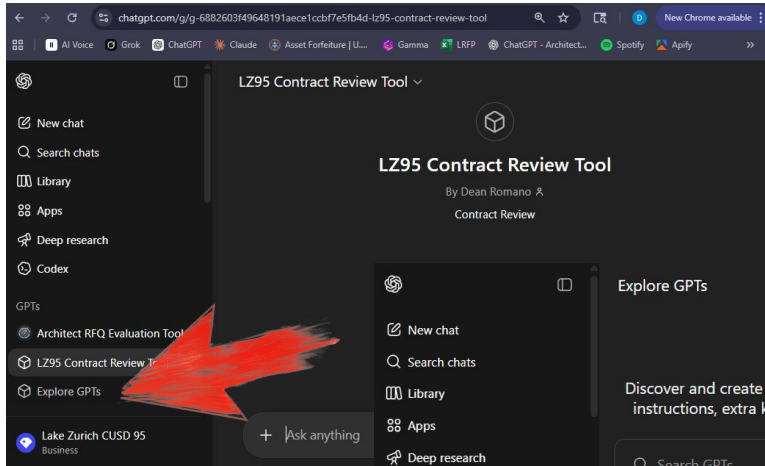
<https://chatgpt.com/g/g-6882603f49648191aece1ccb7e5fb4d-lz95-contract-review-tool>

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Use Cases – Contract Review Tool

Custom GPT : Basic Contract Review Tool:



- Name
- Description
- Instructions
- Conversation starters
- Knowledge (Upload files)
- Recommended Model
- Capabilities (Web Search, Canvas, Image Generation, Code Interpreter & Data Analysis)
- Actions (Create new action)

Custom GPT's are shareable!

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Use Cases – BOE Presentations

Presentations with AI:

Work with AI to build storyboard

- Custom build PowerPoint
- Pull PPT into AI to build script
- Update script and develop AI “assistant”
- Import custom assistant audio/video



LZ95: Financial Educational Series
Understanding School Finance for Illinois Districts

Budget Development Process & Overview

Board of Education
April 9, 2026

OVERVIEW &
KEY FINANCIAL HIGHLIGHTS



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Use Cases – Thought Partner



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Ethics, Data Privacy & “Walled Garden” Tools

Key AI Ethics & Privacy Concerns



Proprietary
vs Public AI



AI Notetakers
& Data Privacy
Risks



Recommended
Walled Garden
Solutions



Critical
Questions for
Vendors

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Audience Questions & Panel Discussion



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Presenters:

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