



Managing and Reporting Grants with AI

Smart Tools, Smarter Oversight

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Bridging The Gap



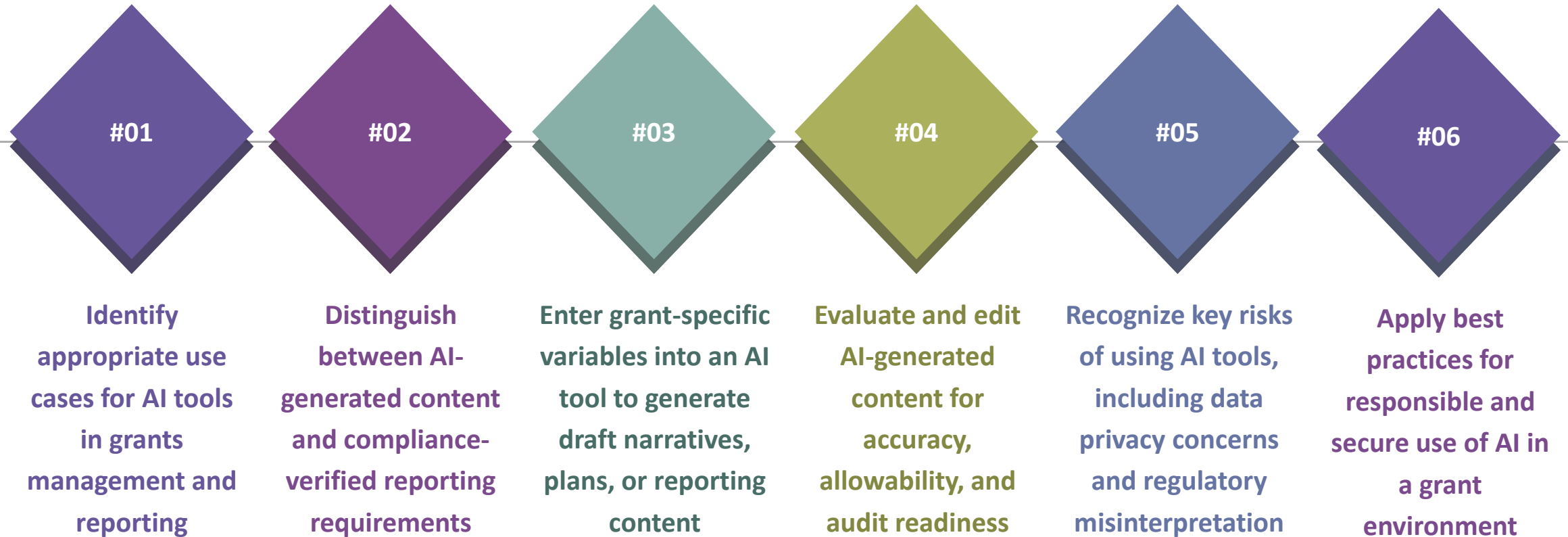
Mara Ash, CIA, CGFM, CMRA, CICA



Mara, Senior Partner at BFS, is a Compliance Expert with over 25 years of experience in finance, compliance, and advisory services across both public and private sectors. She specializes in driving strategic alignment, fostering transparency, and promoting sustainable growth—all while ensuring regulatory compliance. Her deep understanding of government operations and commitment to innovation has made her a trusted advisor in the field.

Mara is also dedicated to supporting public sector auditors and accountants and currently serves as the North American Representative on the IIA Global Advisory Board.

Objectives



Polling Question #1

What best describes your organization's current AI policy?



We have a formal,
written AI policy



We're working on
developing one



There's no formal
policy, but we've
set informal
boundaries



We have no
guidance or policy
at all

Why We're Talking About This

1

AI is everywhere - including grants.

2

Using AI in grant management is like using a power tool - It save's time, but isn't foolproof

3

Today's focus: Using AI responsibly for managing and reporting on grants



What AI Can Do for You

Generate templates for
grant reporting



Help organize ideas into
outlines



Translate policy language
into plain English



Brainstorm tasks or
milestones



Automate formatting or
data sorting
(with the right tools)

Think of AI as your
intern - not your
grant director.

It can do the
busywork, but it
doesn't make
decisions

Five Smart, Safe Ways to Use AI Today

- Draft standard operating procedures
- Simplify policy language for staff training
- Summarize NOFOs for leadership
- Create first drafts of corrective action plans
- Format tables and visuals for reports

Polling Question #2

How are you currently using AI in your grant-related work?



Drafting
narratives or
reports
(or other similar
items)



Summarizing and/or
editing
regulations,
guidance
(and/or similar
items)

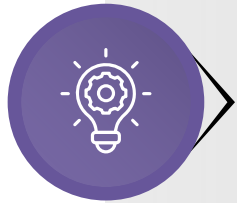


Performing Complex
Analytics
(and/or similar
items)



I don't use it
regularly
OR
I haven't used AI
yet
OR

What AI Can't Do (and What You Must Do)



It won't tell you
you're wrong

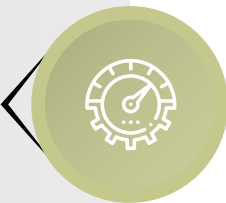


It doesn't know
grant rules

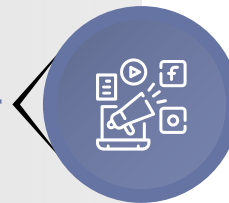


It doesn't fact-
check

- It **won't**
verify if an activity
is allowable or
feasible



It won't catch
fraud, waste, or
abuse



AI will give you a
confident answer—
whether it's right or not.
That's why human
oversight is non-
negotiable

Common AI Pitfalls (and How to Catch Them)

Pitfall	Example	How to Fix
"AI hallucination"	Invents a regulation	Always cite the real CFR reference
Misstated outcomes	Claims success not in data	Verify with source reports
Wrong terminology	Says "donation" instead of "matching funds"	Use your agency's definitions
Policy misreads	Confuses "must" vs "may"	Verify in guidance before including

✓ *Takeaway: AI errors are subtle, but your audit depends on catching them.*

The Privacy Trap

Caution: Confidential Data

AI tools outside your internal system may use your input to "train" the model



If it wouldn't go in a press release, don't paste it into an AI Model



Don't paste Personally Identifiable Information (PII) or protected data into open AI



Assume it's a public forum unless your organization has a closed/private model

Polling Question #3

What is your biggest concern about using AI in grants management?



Privacy or data
confidentiality



Risk of inaccurate
or noncompliant
output



Ethical or legal
concerns



Lack of clear
internal policies
OR
Other

Trust, But Verify



AI in Action – Turning Data into Narrative

Prompt: “Draft a summary paragraph for a quarterly performance report on a tutoring program funded by Title I.”

✓ *Takeaway: AI helps you start, but YOU make it compliant.*

What Happens in an Audit?

Auditors will verify

Did you do what
you said you did

Are your decisions
and outcomes
supported

AI won't be there
at the audit table
-
But your report
will

Is everything
allowable and
allocable

Your program reports become part of your audit trail

Polling Question #4

How confident do you feel using AI responsibly in your role?



Very confident –
I use it often and
safely



Somewhat confident
– but I'm still
learning

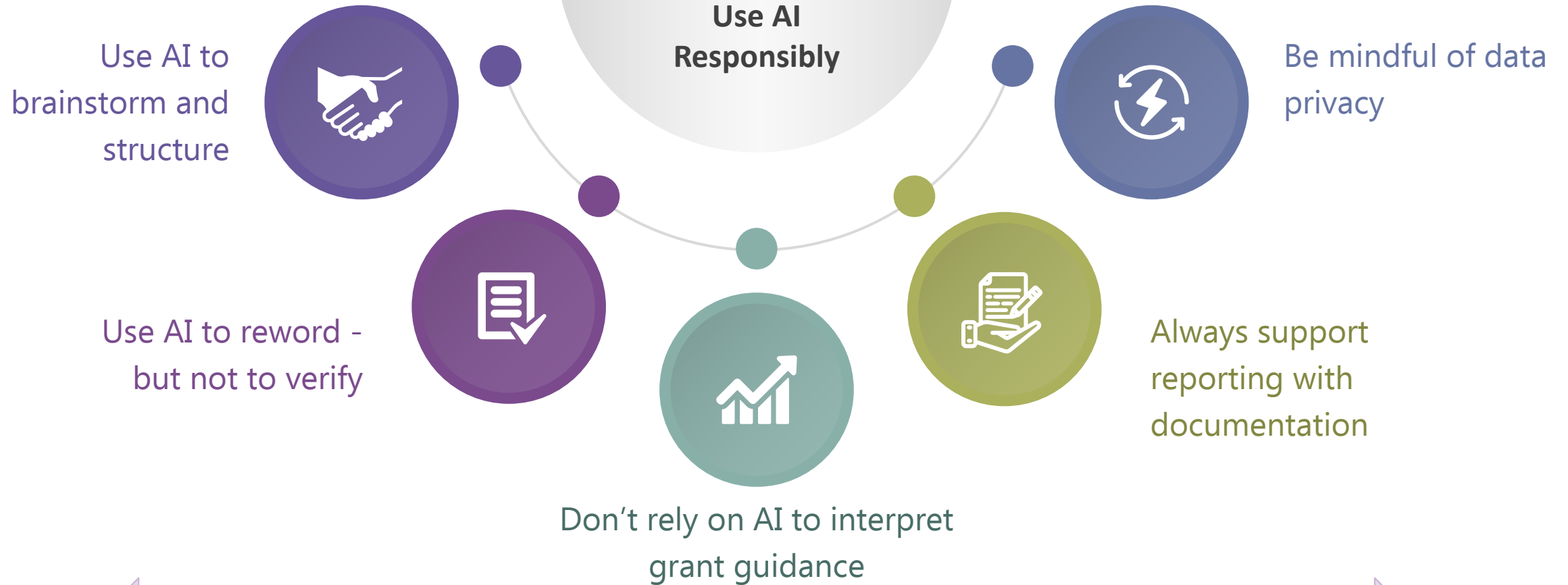


Not confident –
I'm unsure where
to start



I'm not allowed to
use AI at work
OR
Other

Final Thoughts



AI is a tool - not a shield. Your name goes on the report, not the bot's

Thank You for Attending!

**Be sure to attend our next
“Lunch and Learn”!**

Budgeting for the Fiscal Cliff



12 PM | 13 November 2025



Questions



Answers

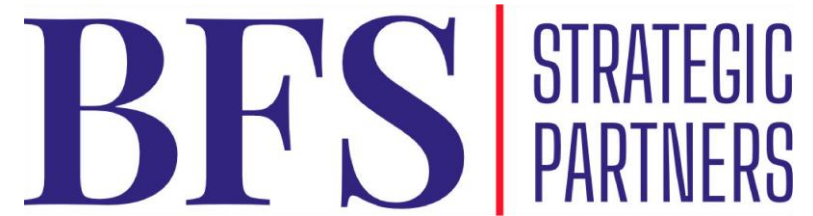


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