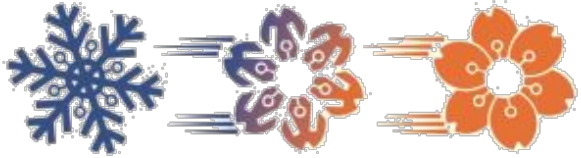


From Frost to Flourish



Washington, DC
Chapter

Spring Training

Artificial intelligence is reshaping financial management, reporting, internal controls, and decision support.

**From Exploration to Execution;
The Road Ahead for AI in the State Department Controller's Office**

Poll Question #1

Where is your organization currently on its AI journey in finance, reporting, or internal control functions?

- 1) We are just beginning to explore AI
- 2) We have held discussions or pilots, but no operational use yet
- 3) We are using AI in limited, targeted ways
- 4) We have an established AI strategy and active implementation underway

Why this conversation matters now

Controller organizations sit at the intersection of high-volume process work, control discipline, and leadership decision support — requiring trust and accountability are designed in from the start.

 **Financial management**

Repeatable tasks, dense documentation, and recurring deadlines create clear candidates for augmentation.

 **Reporting & analysis**

Narratives, variance explanations, and management insight can be accelerated when data is reliable.

 **Internal controls**

Every gain in speed must preserve evidence, reviewability, and clear lines of accountability.

 **Decision support**

Leaders need faster signal detection, better context, and more time for judgment — not less.

Poll Question #2

Which factor is the biggest barrier to expanding AI use in federal financial management?

- 1) Data quality and availability
- 2) Governance, policy, and compliance concerns
- 3) Workforce skills and readiness
- 4) Funding, tools, or technical infrastructure

From exploration to execution

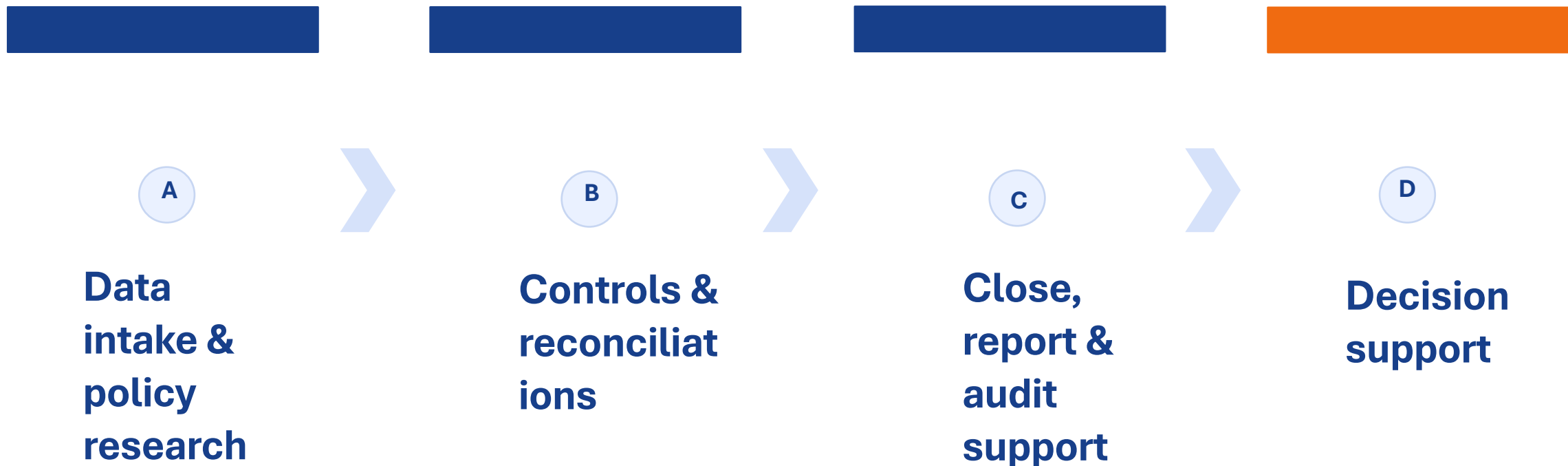
A pragmatic maturity path for a Controller's Office



The key shift is not from “no AI” to “AI everywhere” — it is from isolated experimentation to governed, repeatable use in the work itself.

Where AI can create value across finance and reporting

Best-suited starting points combine high volume, stable rules, accessible documentation, and natural human review.



Practical early-use candidates: narrative drafting, document summarization, policy search, anomaly triage, and exception prioritization.

Poll Question #3

In which area do you believe AI has the greatest near-term value for a Controller's Office?

- 1) Financial reporting and analysis
- 2) Internal controls and compliance monitoring
- 3) Decision support and forecasting
- 4) Routine administrative and documentation tasks

Enablers

- Clear sponsorship and visible ownership
- Secure, approved tooling and access pathways
- Fit-for-purpose data standard and metadata
- Focused use-case selection with measurable outcomes
- Workforce learning, supervision, and change champions

Barriers

- Fragmented data and inconsistent business definitions
- Unclear governance pathways or risk tolerance
- Explainability, privacy, records, and security concerns
- Difficulty fitting new tools into legacy workflows
- Limited time to test, validate, and build confidence

Poll Question #4

What is most important for responsible AI adoption in a federal finance environment?

- 1) Strong governance and accountability
- 2) Reliable data and sound internal controls
- 3) Workforce training and change management
- 4) Clear use cases with measurable mission value

The road ahead: 12–18 months execution priorities

A practical sequencing strategy keeps progress visible while building confidence, evidence, and reusable patterns.



Now 0–90 days

- Select 2–3 bounded use cases
- Confirm guardrails and approvals
- Define success metrics and baselines



Next 3–9 months

- Run pilots and validate outputs
- Document controls and review steps
- Expand workforce learning



Then 9–18 months

- Integrate into core workflows
- Track benefits and control health
- Scale reusable methods and playbooks

Keys

1 Start where the work is ready

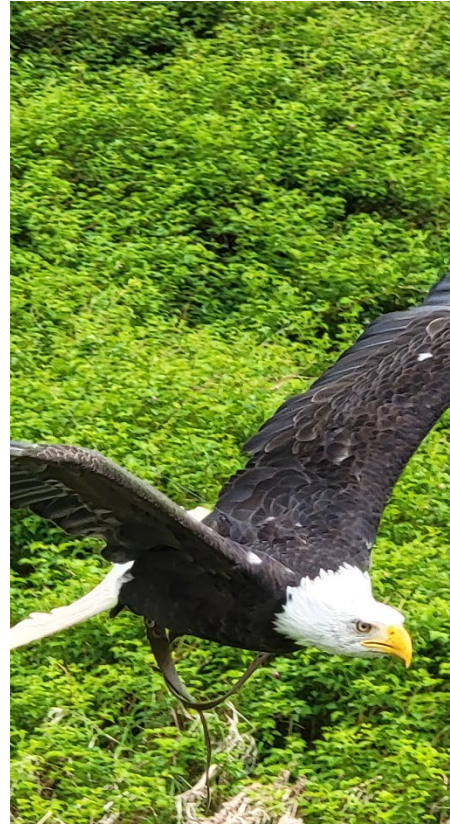
The best entry points are high-volume, rules-informed tasks that already include a natural human review step.

2 Scale depends on trust

Governance, data quality, internal controls, and workforce readiness are not side issues — they are the foundation for adoption.

3 Execution is phased

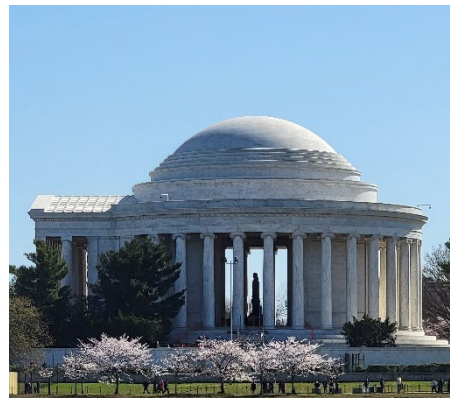
A successful road ahead moves from learn → pilot → prove → institutionalize, with evidence and accountability at each step.



StateInsight

See more, Know more, Do more

The data foundation to support mission decisions and operational excellence at the Department of State





The Challenge We Face

An inconsistent view of our total financial picture for grants, contracts, and IAAs due to scattered financial data across multiple systems.

Difficult to consolidate and analyze information, hindering data-driven decisions.

Lack of integration affects alignment with foreign policy goals, identification of funding gaps/overlaps, and resource accountability.

Programs from USAID with very little insight into the breath, depth, and structure of their vehicles.



StateInsight Capabilities



Common Operating Picture

- Explore the data ingested across State and USAID source systems



StateInsight DocumentChat

- Interact with documents and attachments using AI to generate summaries, find contact information, and suggest milestones



Award360

- Grants, Contracts and interagency 360-Degree View for fully integrated visibility into grants and payments at the line level and in aggregate



USAID Transition Toolbox (Greenlist)

- Coordinate requests and approvals for changes to USAID awards as they transition to State



PMS Payment App

- Perform two-pass approvals on payments for Greenlist awards

Driving:

Enhanced executive decision-making

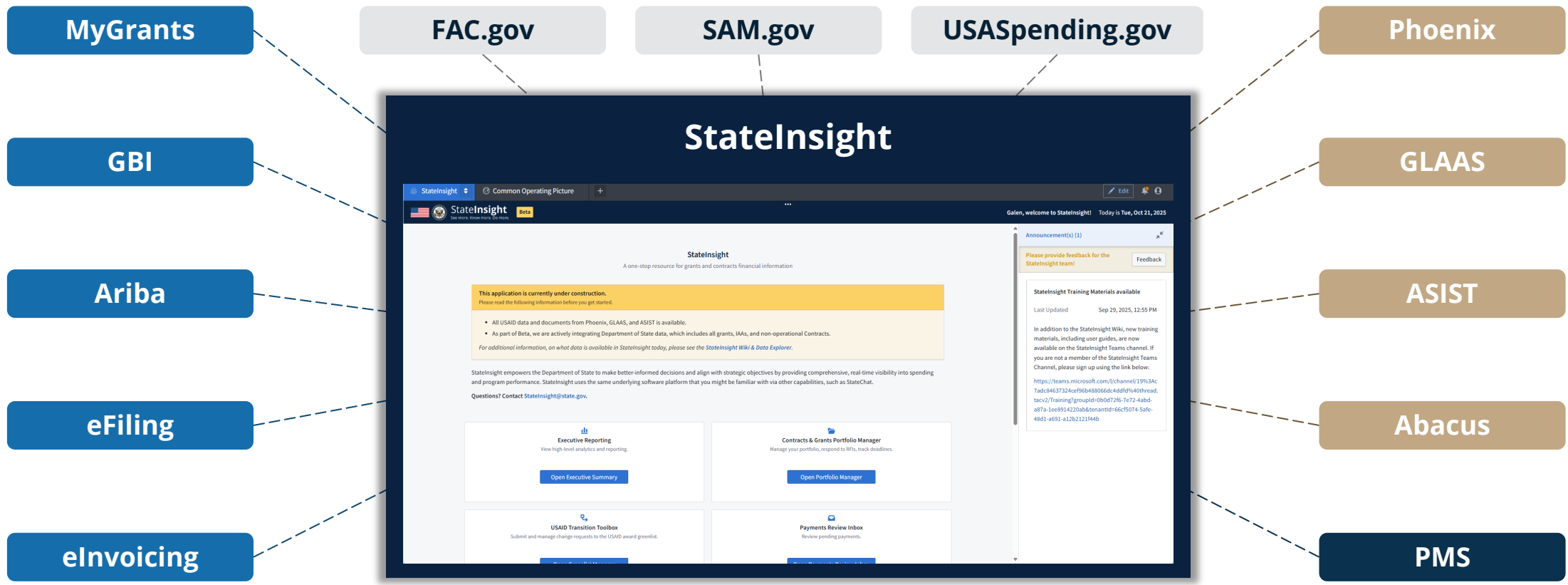
360° grants and contracts portfolio

AI-enabled efficiencies



StateInsight Data Sources

StateInsight integrates State, USAID and other USG systems so that they can speak the same language.



Department of State Systems

Public Data

USAID Systems

Other USG System