AI SUMMIT HANDS-ON LAB

Exercise 3: From Spreadsheet to Story

What Does the Data Actually Say?

Data exploration • Skepticism • Iterative prompting • Responsible funder writing

PARTICIPANT PACKET

There is an Excel workbook linked later in this document. The workbook contains 120 entirely fictional records. Those records will be your data source for this exercise.

Suggested prompts are provided, but you are free to experiment with different approaches.

Workshop data rule

Use only the fictional workbook supplied for this exercise. Do not replace it with a real case export or paste real client, case, employee, personnel, or other confidential information into the AI tool.

Recommended time 20 minutes + one optional early-finisher extension

Best group size 3–6 participants per table

Participant outcome A short, defensible funder narrative plus a record of what the data does not prove.

Start Here

Today's constraint

Do not browse for outside data. Do not enter real client or case information. Your goal is not to make the program look as good as possible. Your goal is to write something the organization could defend if the funder asked, 'How do you know that?'

Scenario

You work for the fictional Chesapeake Access Project. It received a one-year grant to expand housing and public-benefits services. The funder has asked for a short year-end account of who was served, what happened in their matters, and what the organization learned. Your communications director has asked your table to use an AI tool to help make sense of the attached data and prepare a first draft.

Your core work product

- Five candidate findings from the workbook.
- A corrected version of those findings after a skeptical second pass.
- A 125–175 word funder narrative using only claims the dataset supports.
- Three internal follow-up questions and two data improvements for next year.

What good work looks like

☐ Every percentage comes with a numerator and denominator.

☐ The denominator and any excluded records are explained.

☐ A small subgroup is described as small, not treated like a stable success rate.

☐ An association is not rewritten as proof that one thing caused another.

☐ Pending, blank, or inconsistent values are visible instead of quietly discarded.

☐ The final narrative says 'records' or 'matters' when the file does not establish unique clients.

ROUND 1

Find the story

SUPPORTING FILE

AI Summit - From Spreadsheet to Story - Synthetic Data.xlsx

Start on the Program Data sheet. Use the Data Dictionary when you need to check what a field means. The workbook is entirely fictional.

Task

Give the workbook to your AI tool and use the prompt below. Keep this first pass broad. You want to see what the model notices before you tell it where the traps might be.

Prompt #1: Find the story

Review the attached fictional program dataset. Identify the five findings a funder would be most likely to care about. Include relevant numbers and explain what each finding may suggest about the program.

Use only the workbook. Do not browse the web or add outside facts. Do not write the funder narrative yet.

Quick human check

☐ Mark one finding that is useful.

☐ Mark one finding that surprised you.

☐ Mark one finding you do not yet trust.

☐ Circle every percentage. Can you tell exactly which records were counted?

Save the first answer

Do not overwrite Round 1. You will compare it with the answer after you ask the model to challenge itself.

ROUND 2

Challenge the story

Task

Now make the AI show its work. The goal is not to make the answer more cautious in general. It is to identify exactly which claims need to change and why.

Prompt #2: Challenge the story

Re-examine the five findings critically. For each finding:

- show the numerator and denominator;
- state which records, if any, you excluded and why;
- identify missing or inconsistent data that could affect the conclusion;
- separate direct observation from inference;
- flag language that suggests causation without evidence;
- flag percentages based on small groups; and
- identify anything that should be checked in the workbook before publication.

Revise or withdraw any finding that is not adequately supported. If you calculate a favorable-outcome rate, state exactly how you defined the denominator.

Your story audit

Use this grid for the three claims you are most likely to carry into the final narrative.

Finding	Numerator / denominator	Keep / revise / drop	Reason or caveat

ROUND 3

Write the story

Task

Use the findings that survived Round 2 to produce a recognizable work product. A careful narrative can still be clear and readable.

Prompt #3: Write the story

Draft a 125–175 word year-end narrative for the funder using only findings the workbook supports. Avoid causal claims unless the data actually establishes causation. Include a short caveat where it matters, but do not turn the narrative into a wall of disclaimers.

At the end, separately list:

- three questions the organization should investigate internally; and
- two pieces of additional data that would make next year's report stronger.

Do not invent a client story, quote, program target, comparison year, or explanation for a pattern.

Before you call it done

☐ Can you reproduce every number from the workbook?

☐ Did you say what an outcome rate includes and excludes?

☐ Did a correlation quietly turn into a success claim?

☐ Did you generalize from a tiny region or subgroup?

☐ Did you add a reason, target, quote, or comparison that is not in the file?

Three-minute table debrief

- What did the AI first say that the data did not really support?
- What did it notice that a person scanning 120 rows might have missed?
- What would you verify before sending any of this to a funder?

Finished early? Test the chart

OPTIONAL ADD-ON

The official exercise ends after Round 3 and the table debrief. If you finish early, use the prompt below. A chart storyboard is fine if your tool cannot create a chart.

Optional prompt: Show the story without hiding the denominator

Recommend one chart that would help the funder understand an important program finding. State the exact rows, categories, numerator, denominator, and excluded records the chart should use.

Then explain what misleading impression the chart could create and how its title, labels, annotation, or design should reduce that risk.

If your tool can make the chart, create it and audit the finished visual. Check that percentages, group sizes, labels, and caveats still match the approved plan.

Use-it-Monday boundary

Do not swap in a real case export by default

A real program dataset can still contain confidential or identifying information even after names are removed. Before repeating this workflow at work, use public, synthetic, already-published aggregate, or specifically approved data. Follow your organization’s policy and confirm that both the tool and the proposed data use are approved. Minimize unnecessary identifying fields.

Bring the pattern back to work

A safer transfer pattern

Start with public, synthetic, already-published aggregate, or specifically approved data. Ask for candidate findings. Demand visible calculations. Separate observation from explanation. Write for the audience. Then have a person verify the claims, the wording, and whether the data use itself was approved.

Your transfer idea

Name one safe dataset from your own work that could support a similar workflow:

What useful work product could you create from it?

What approval, aggregation, or data-minimization step would you need first?