

Social Impact Chatbot Workbook

Using AI for Impact

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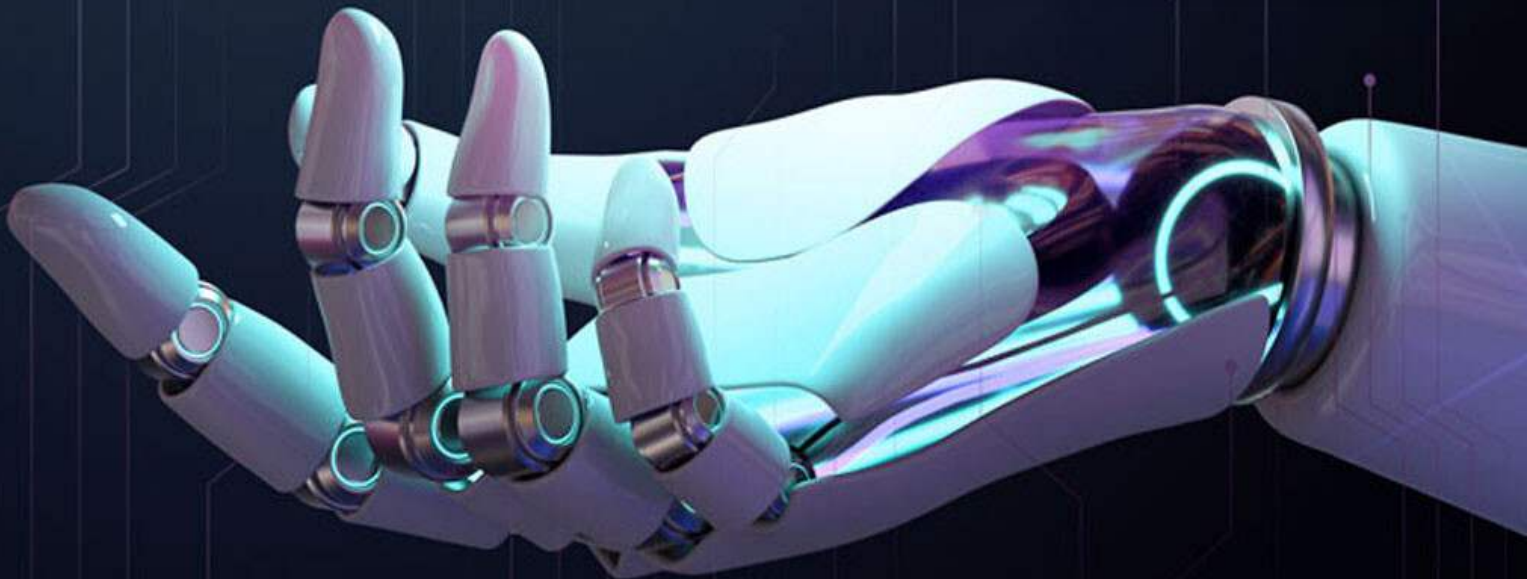


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Book Purpose

This book is intended for **government and nonprofit program staff and leaders.**

Building a chatbot for social impact requires structured planning, clear objectives, and an inclusive, ethical mindset. This workbook will guide your organization through a step-by-step process, from concept to launch, ensuring you develop a chatbot that aligns with your social impact goals and truly serves your audience.

This book assumes that you have internal or external technological support your technological and AI development. A future workbook will focus on guiding your organization through the technological aspects of AI development for social impact.



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1. Workbook Overview

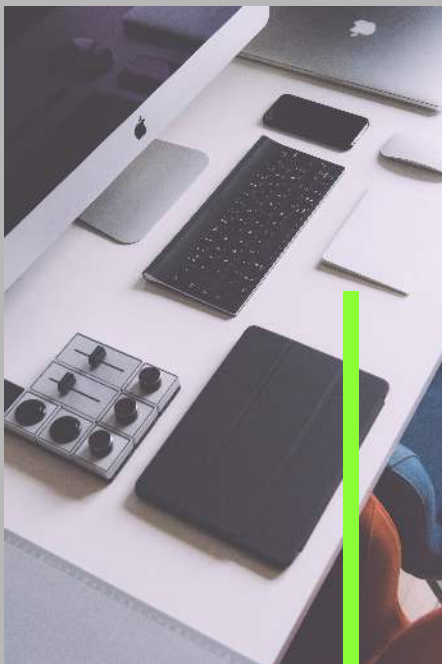


What you will learn:

- How to align chatbot objectives with your organization’s broader mission within the context of programs and service delivery.
- The necessary steps to gather user needs and design a chatbot that truly helps your audience.
- Key ethical and privacy considerations when using AI or data-driven solutions.
- Practical guidance on building, testing, piloting, and scaling your chatbot solution.

The goal is to help your team develop a structured, impactful chatbot that fosters the outcomes you seek—whether that’s connecting users to social services, improving access to education, or raising awareness about an important cause.

Tip: Encourage cross-functional collaboration early. Successful chatbots usually draw on expertise from leadership, subject-matter experts, technology teams, and front-line staff.



2. Define Your Social Impact Goals





Purpose: Ensure that the chatbot is designed to drive measurable impact aligned with your organization's mission.

- **Articulate Your Mission**

- Write down your organization's social mission: who do you serve, and what problem are you trying to solve?
- Which program(s) will use the chatbot and how will they support achieving impact?

- **Chatbot Objectives**

- Determine how a chatbot can specifically advance your mission. What programs will leverage the chatbot? For example, are you aiming to answer FAQs about government benefits, screen for eligibility for programs, or guide users to relevant resources?
- Align these objectives with your organization's strategic plan, ensuring you have buy-in from leadership.

- **Success Measures**

- Draft clear success metrics for the chatbot. These might include number of users served, time saved for staff, or measure of improved outcomes (e.g., more people applying successfully for a benefit). To the degree possible, we want to understand the chatbot's expected contribution to overall program success.
- Keep these metrics user-centered (like user satisfaction) to ensure real social impact.

Chatbot Objectives

List the programmatic objectives for your chatbot with clear articulation of how it will support your organization's mission.

The chatbot will deliver on the following:

1.

2.

3.

4.

5.

Success Measures

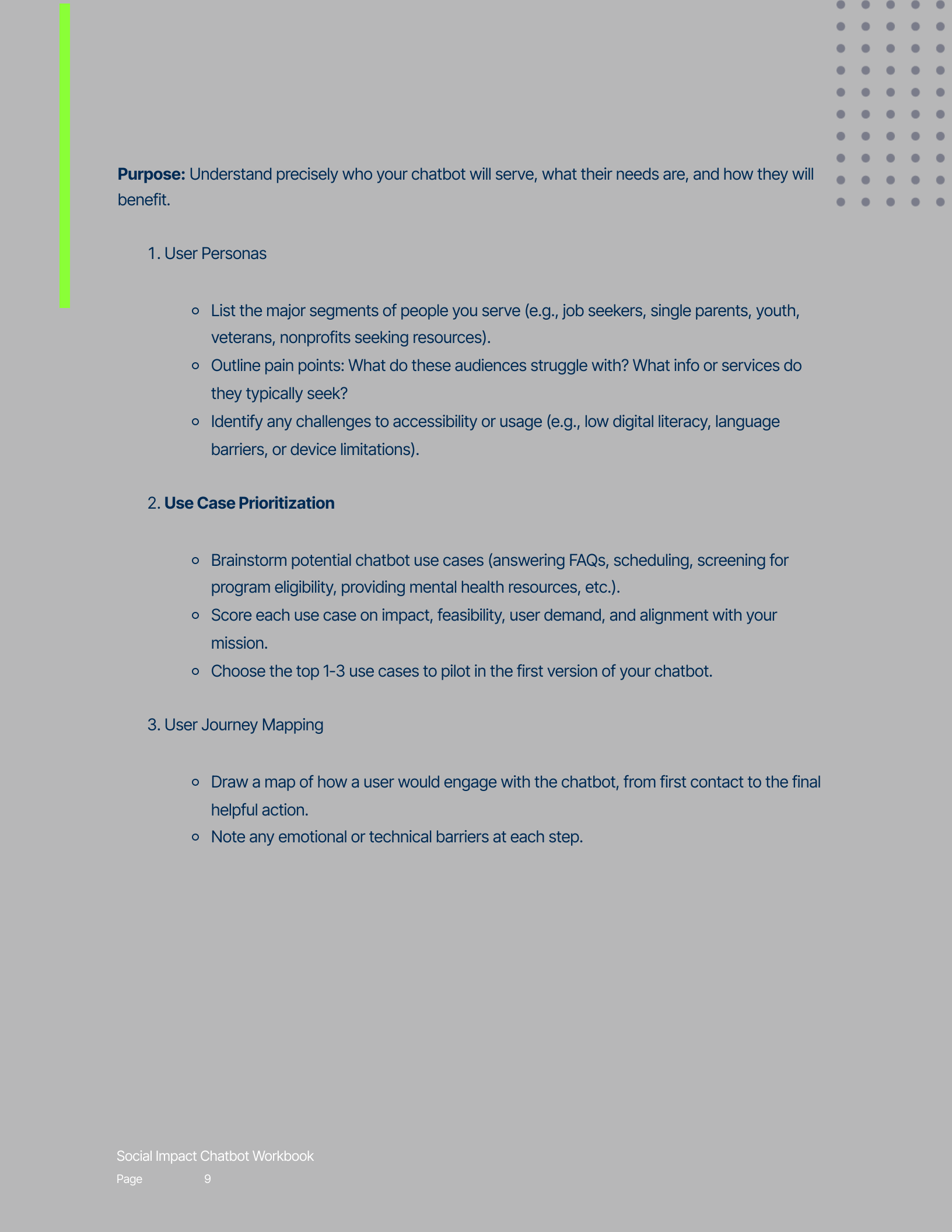
Share your thinking about the success metrics for the chatbot. These could include metrics around program success, model correctness, use of the chatbot (number of users, interactions, etc.), or other metrics.

In the first year, of the chatbot's operation, we will monitor these metrics:

- ---
- ---
- ---
- ---
- ---

3. Identify Your Audience and Use Cases





Purpose: Understand precisely who your chatbot will serve, what their needs are, and how they will benefit.

1. User Personas

- List the major segments of people you serve (e.g., job seekers, single parents, youth, veterans, nonprofits seeking resources).
- Outline pain points: What do these audiences struggle with? What info or services do they typically seek?
- Identify any challenges to accessibility or usage (e.g., low digital literacy, language barriers, or device limitations).

2. Use Case Prioritization

- Brainstorm potential chatbot use cases (answering FAQs, scheduling, screening for program eligibility, providing mental health resources, etc.).
- Score each use case on impact, feasibility, user demand, and alignment with your mission.
- Choose the top 1-3 use cases to pilot in the first version of your chatbot.

3. User Journey Mapping

- Draw a map of how a user would engage with the chatbot, from first contact to the final helpful action.
- Note any emotional or technical barriers at each step.

Exercise: Create at least two persona profiles and map out a day-in-the-life scenario in which they would benefit from using your chatbot. This work is often supported by facilitators skilled in user experience and human centered design.

User Persona 1

Who is your primary user type for the chatbot. What does the user need to do? How will the user engage the chatbot to do meet their needs?

User Persona 2

Name another user type for the chatbot. What does the user need to do? How will the user engage the chatbot to do meet their needs?

4. Data, Privacy, and Ethical Considerations



Purpose: Proactively address potential ethical risks, ensure data security, and uphold user privacy.

- **Data Requirements**

- Determine what data the chatbot needs to collect (if any) and how it will be used.
- Minimize personal data collection—only gather what’s essential for core functionalities.

- **Data Storage and Security**

- Assess how you will store user data (in-house systems, cloud services, third-party platforms?) and confirm compliance with relevant regulations (GDPR, HIPAA if applicable, etc.).
- Ensure you have protocols for secure data transfer, encryption, and user consent.

- **Ethical AI and Bias**

- If using AI or machine learning, examine your training data for bias.
- Consult relevant frameworks like the NIST AI Risk Management Framework or AI Bill of Rights to promote fairness, transparency, and accountability.

- **User Consent and Transparency**

- Develop a privacy policy and incorporate easy-to-understand disclaimers about how their information is used.
- Provide an opt-out mechanism and straightforward ways for users to get more info on data handling.

Exercise: Understand your data: list the data source, how it is generated, stored, used and who has access. Determine risk level for potential data leaks or privacy breaches.

Data For AI

Fill in the table to better understand that data you will use to build and use in your AI chatbot.

Data Source	How Generated?	Stored Where?	User Access	Risk Level	Other

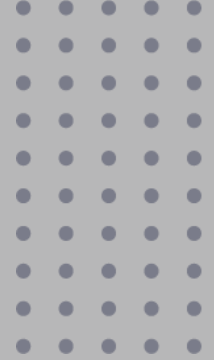
Ethical Issues

Conduct a process with stakeholders and staff to surface ethical and responsible use issues. Develop plans to address those concerns in the chatbot implementation.

- _____
- _____
- _____
- _____
- _____

5. Plan Chatbot Functionality and Flow





Purpose: Determine core functions of your chatbot and outline the expected dialogue flows, keeping in mind that Generative AI may yield different answers in different contexts.

1. Core Feature Set

- List the features critical to your chatbot’s social impact, such as Q&A, scheduling, or knowledge-base lookup.
- Prioritize features for a minimum viable product (MVP) to keep initial scope focused.

2. Conversational Flow Design

- Create conversation scripts or decision trees. Think about user queries, prompts, and how your chatbot should respond.
- Consider branching logic: if a user says “I need housing assistance,” you might direct them to available housing resources.

3. Personality and Tone

- Decide on your chatbot’s tone—should it be formal, empathetic, encouraging, or purely informational?
- What persona do you want the chatbot to take on? Are they a social worker? A financial counselor? Give the chatbot a definitive role and job description.
- Align the tone with your organization’s brand and with the sensitive or supportive nature of a social-impact context.

4. Multi-Lingual Support

- If serving diverse linguistic communities, identify the languages you’ll support at launch.
- Consider integrating translation features within Generative AI and/or working with multilingual staff to design content.

Exercise: Draft a conversation flow for one high-priority user scenario (e.g., user inquiring about eligibility for a social service program). Map out the entire back-and-forth conversation.

Expected Conversation Flow

Imagine a back and forth between your user/client and your chatbot.

Our chatbot's initial request will be: _____

- User: _____
- *Chatbot:* _____
- User: _____
- *Chatbot:* _____
- User: _____

Chatbot Persona

Give your chatbot a role and a job description. You will provide these instructions to build your chatbot.

6. Select Technology Tools and Platforms



Purpose: Choose the right tools to implement your chatbot effectively. This is the domain where it makes to engage your technology staff or tech/AI consultant.

1. Platform Options

- Evaluate chatbot building platforms (e.g., Botpress, Rasa, API driven from LLMs, or custom-coded solutions).
- Consider no-code or low-code solutions for quick deployment if your team is not highly technical.

2. LLM Providers and Integrations

- If using large language models (LLMs), assess platforms like OpenAI, Anthropic, Google, or open-source LLMs, you will need to either build User Interface or purchase a service that interfaces with the APIs for the LLM.
- Check for compliance with your privacy and security requirements.

3. Integration Requirements

- Identify systems your chatbot needs to integrate with, such as CRM tools, scheduling software, or your existing website.
- Check for straightforward APIs or data connectors for these integrations. Agents are increasingly making this easier. It is worth exploring agentic AI options as the LLM's evolve.

4. Cost and Sustainability

- Outline your total budget for chatbot development, including hosting, potential LLM usage, ongoing maintenance, and future scaling.

Exercise: Create a comparison chart of at least three chatbot platforms or frameworks, noting pros/cons, estimated costs, ease of use, and required technical expertise. Involve the staff, volunteer, or consultant technical expertise to support this exercise.

Chatbot Platform Comparison

Evaluate different chatbot vendors below.

Platform	Underlying LLM Used	Pros	Cons	Estimated Costs	Technical Expertise Needed
Platform 1					
Platform 2					
Platform 3					
Platform 4					
Platform 5					
Platform 6					

7. Build and Test Your Chatbot



Purpose: Develop the first working version of your chatbot and validate it with real-world feedback.

1. Development

- Start with a pilot version focusing on your highest-impact use case.
- Build or customize conversation flows, integrating data sources where necessary.
- Keep thorough documentation of your code and conversation structures.

2. Alpha Testing

- Get into an iteration - feedback cycle by testing the earliest versions and using the feedback to adjust your prompt or model.
- Conduct internal tests with staff or volunteers to catch errors and gather quick feedback.
- Check for issues like incorrect responses, partially correct responses, or slow load times.

3. User Testing

- Recruit a small number of real end-users (or a representative sample) to try your chatbot.
- Collect feedback on user experience, clarity of responses, and any missing features.
- Iterate on fixes and improvements.

4. Ethical Review

- Run bias and fairness checks if you are using an LLM. Evaluate if the chatbot provides equitable and consistent responses to diverse user inputs.
- This is the time to revisit the ethical and response use concerns that your team raised in planning.



8. Plan Your Pilot Deployment



Purpose: Strategize the pilot deployment of your chatbot under real-world conditions.

1. Pilot Objectives

- Outline goals for the pilot: e.g., 100 real user interactions in the first month, 80% user satisfaction rating.
- Determine pilot scope (target region, sub-population, or specific channel like your website's homepage).

2. Communications and Launch Materials

- Prepare announcements, user guides, or staff training materials.
- Provide a feedback channel (email, survey, or chat rating) so pilot users can easily share suggestions or report issues.

3. Monitoring and Support

- Assign team members to monitor chatbot logs and respond to technical or user-reported concerns.
- Develop standard operating procedures for escalations (e.g., if user messages about self-harm, immediate referral to mental health crisis line, etc.).

4. Timeline and Milestones

- Ready the organization for post pilot implementation including ongoing iterative cycles of continuous development of the chatbot that includes work on AI and the user interface.
- Set a pilot start date, end date, and a mid-pilot review period to assess progress.
- Communicate these milestones to stakeholders, especially internal leadership and staff.

Exercise: Draft a pilot plan listing your pilot objectives, staff roles, communication strategies, and timeline.

4 Week Pilot Plan

SUN	MON	TUES	WED	THURS	FRI	SAT
Wk 1: Communication with Users about Pilot						
Wk 2: Users Engage Chatbot and Submit Feedback						
Wk 3: Another Group of Users Engage and Submit Feedback						
Wk 4: Summarize Results from Evaluatio Forms						
Wk 5: Prioritize Fixes and New Features for Next Build						

9. Measure Impact and Continuously Improve





Purpose: Track performance metrics, gather insights, and refine the chatbot for long-term success.

1. Key Metrics

- Monitor usage stats (number of conversations, user satisfaction ratings, completion rates).
- Track mission-driven metrics: e.g., improved program enrollment or decreased wait times.

2. Data-Driven Iteration

- Analyze user queries to see if there are recurring unhandled requests.
- Update conversation flows, knowledge bases, or integrations accordingly.

3. User Feedback

- Encourage ongoing user feedback (in-chat rating, short surveys) to gather suggestions.
- Address feedback promptly and communicate improvements to end-users.

4. Continuous Learning

- Revisit the social impact goals and see if the chatbot is achieving them.
- Scale successful features and rework or remove underperforming ones.

Exercise: Create an impact-tracking dashboard that captures both operational and social-impact metrics (like user satisfaction, daily usage, and improvements in real-world outcomes). Present these metrics at regular intervals.

Impact Tracking

Fill in chatbot data on an interval that makes sense for your organization.

	Metric	Type	Time Period 1	Time Period 2	Time Period 3
1	Daily usage (avg. # of users and conversations)	Operational			
2	User Satisfaction.	Operational			
3	AI Performance.	Operational			
4	Improved Efficiency (e.g. wait times)	Operational			
5	Reported Outputs From Chatbot Use	Social Impact			
6	Reported Outcomes from Chatbot Use	Social Impact			

10. Launch and Scaling Roadmap





Purpose: Finalize your plan for a broader rollout and long-term sustainability.

1. Full Launch

- Move beyond a limited pilot if key metrics and user feedback meet your success thresholds.
- Announce the chatbot widely through newsletters, social media, or press releases.

2. Scaling to More Use Cases

- Add additional conversation flows or integrate with new data sources.
- Incorporate new services or programs as your chatbot grows in sophistication.

3. Sustainability Plan

- Outline how you will maintain the chatbot over time: staff training, budgeting for LLM usage (if relevant), or platform licensing.
- Plan for staff transitions or expansions to ensure that knowledge and maintenance capability remains in your organization.

4. Governance and Policy

- Determine who “owns” the chatbot from a governance perspective.
- Document responsibilities for content updates, ongoing compliance checks, and new feature requests.

Exercise: Develop a 12-month roadmap listing planned features, approximate budgets, and staff roles. Include triggers for major decision points, like expansions or advanced AI integrations.

Chatbot Budget

Plan and manage your budget. Top level domains and suggested line items are listed below

Top Level	Item 1	Item 2	Item 3	Item 4	Item 5
Strategy & Planning	Needs Assessment.	Ethics Review	Accessibility Review		
Design & Development	UI/UX Design	Web Development	Integration	Testing and QA.	
Content & Localization	Content Planning	Dialogue Writing	Translations	Local and Organizational Content	
AI Services	Data Preparation	AI Model Dev./ Prompt Engineering	API Usage Fees (e.g., OpenAI, Claude)	Cloud Hosting (e.g., AWS)	Logging Monitoring Tools
Launch & Outreach	Branding Development	Marketing Spend	Training Development	Feedback Mechanism Setup	
Ongoing Development	Model Tuning and Content Updates	Bug Fixes and Technical Updates	Analytics and Reporting		

Next Steps:

1. Assemble your core team of stakeholders.
2. Complete the exercises for each workbook section.
3. Use the outputs to develop a comprehensive project plan.
4. Secure the resources and partnerships necessary.
5. Move forward with building your pilot chatbot!

Remember: The chatbot journey is iterative. Start with small, high-priority use cases, focus on real user needs, test relentlessly, and build a culture of continuous improvement. Best of luck in your development of a social impact chatbot that genuinely helps those who need it most!



Reach Out If You Need Assistance
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About the Author

Stephen Rockwell brings extensive experience as an AI and digital strategist and social impact leader whose career has focused on leveraging technology to address social and environmental challenges. He founded HumanServices.ai, which leverages AI to improve the way social impact organizations deliver programs to ensure that communities receive the support they need. Stephen has built AI-driven products and models for social impact, advised federal and state governments on AI policy, and currently sits on the Partnership for AI's Global Task Force for Inclusive AI. He holds an MPA from Harvard Kennedy School, an MBA from MIT Sloan School of Management, and a BS in Policy Analysis and Management from Cornell University.



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