

Leading with AI:

Practical Strategies, Shared Understanding,
and What Comes Next

AI for Classified Professionals

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How Are You Feeling About AI Right Now?

Take a moment. All of these are valid — and common among classified professionals:



Overwhelmed

Too much change, too fast



Curious

Could this help my daily work?



Skeptical

Tech promises don't always deliver



Pressured

Feel like I should already know this



Cautious

Worried about mistakes or data privacy



Hopeful

Maybe this gives us back some time

All of these are appropriate. The goal today is clarity, not pressure.

Welcome — What We're Doing Today

AI can support the everyday work of classified professionals. Today we explore real-world applications, build shared understanding, and look ahead to what is coming next — with student success at the forefront.

AI concepts and shared language

Real-world applications for classified roles

Equity, transparency, and responsible use

Hands-on practice and guided discussion

Agentic AI and what comes next for classified roles

Wrap-up, action plan & Q&A

PART 1

What is AI and How Does It Actually Work?

What you need to know.

AI in Plain English

Artificial Intelligence

Software that can do tasks that used to require human thinking — like answering questions, writing, summarizing, or recognizing patterns.

Generative AI

AI that creates new content: text, images, summaries. Tools like ChatGPT, Claude, and Copilot are generative AI.

Large Language Model (LLM)

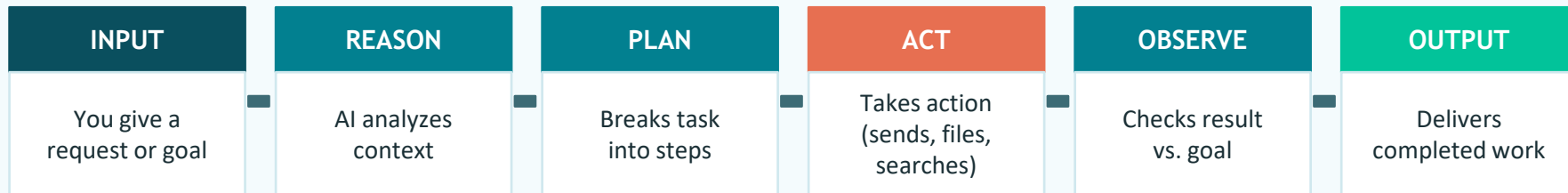
The engine behind most AI chat tools. Trained on enormous amounts of text — learns to predict what words, sentences, or answers make sense.

What AI is NOT: AI is not magic, not all-knowing, and not always right. It doesn't truly "understand" — it predicts likely responses based on patterns. That's why YOUR judgment matters every single time you use it.

💡 *Think of it like autocomplete but leveled-up — it finishes your thought based on what sounds right, not what's actually true.*

Agentic AI: When AI Stops Answering and Starts Acting

Most AI tools today respond to you. Agentic AI takes actions on your behalf — and it's already here.



↻ This loop repeats automatically until the goal is complete — no prompt needed for each step.



AI Takes Real Actions

It doesn't just draft an email — it can send it. Doesn't just suggest a meeting time — it can book it. Actions happen in your systems.



Guardrails Are Essential

Because AI acts autonomously, boundaries matter more than ever. What can it access? What can it approve? Human oversight must be defined upfront.



Human in the Loop

Best practice keeps a human approving key decisions — especially anything involving student records, money, or communications sent on behalf of the institution.



Copilot in Microsoft 365, Claude, and Google Workspace are all rolling out agentic features. You may already be using early versions.

Shared Language: If You Can Name It, You Can Lead It

The organizations — and people — that build shared language build shared strategy.

 Models	 Workflows	 Governance	 Conversations
Predictive AI Pattern recognition: fraud detection, spam filters	Automation Rule-based; follows fixed steps, no reasoning	Shadow AI Unauthorized AI use — happening without oversight	"Which layer?" Ask: Gen AI or Agentic AI? Name it before you govern it.
Foundation Model Base infrastructure: Core AI trained on broad data (Open AI)	Agentic Execution Context-aware; AI decides how to act	Auditability Can you trace what AI did and why?	"What guardrails?" If you can't answer, governance hasn't started.
Generative AI Creative capability: AI that creates text, images, summaries (ChatGPT)	Guardrails Boundaries and rules set on what AI can do	Policy Lag When adoption outpaces the rules governing it	"Who's accountable?" Define human responsibility before deployment.
Agentic AI (Multi-Agent) AI that acts autonomously: plan, decide, execute (workflows)	Human in the Loop Human approves key decisions before AI acts	Governance vs. Regulation Proactive vs. Reactive Internal oversight vs. External compliance	"Is this shadow AI?" If it's in use without review — it already is.

THE WORDS WE SHARE BECOME THE DECISIONS WE ALIGN ON.

PART 2

AI in Your Classified Role: Real Use Cases

Practical examples tied to the work you actually do.

Communication

Responding to repetitive student emails

You receive 20 emails asking about the add/drop deadline. Prompt AI: "Draft a clear, friendly response explaining that the add/drop deadline is [date] and students should contact their counselor if they need an exception." Review, personalize, send.

Rewording a sensitive message

You need to tell a vendor their invoice is on hold due to a discrepancy. Prompt AI: "Rewrite this message to be professional and firm but not confrontational." Paste your draft — AI smooths the tone while you keep the facts.

Translating plain-language summaries

A student needs to understand a complex financial aid satisfactory academic progress (SAP) warning letter. Prompt AI: "Explain what this type of SAP warning means in simple, non-intimidating terms for a first-generation college student." Always verify against official policy before sharing.

Writing announcements or event reminders

Need a campus-wide reminder about parking changes during construction? Prompt AI: "Write a clear, two-paragraph announcement for students and staff about temporary parking restrictions, emphasizing alternate options." Saves 20 minutes of drafting.

Documents & Organization

Building meeting agendas

Give AI your bullet points: "Create a professional 60-minute department meeting agenda covering: budget update, new hire orientation plan, facilities request status, and open Q&A." Returns a timed, formatted agenda in seconds.

Turning meeting notes into action items

Paste your rough notes after a meeting. Prompt: "Organize these into: decisions made, action items with owners, and follow-up questions." Transforms messy notes into a clean, shareable summary.

Drafting or improving procedures

Need to document how your office handles incoming records requests? Prompt: "Write a step-by-step procedure for logging, routing, and responding to public records requests, based on these notes: [paste notes]." Creates a structured draft you can refine.

Creating FAQs for students or the public

Prompt: "Based on this policy [paste], write a 6-question FAQ a first-year student would actually ask, with plain-language answers." Saves hours of reformatting policy language into something readable.



Research & Problem-Solving

Getting up to speed on an unfamiliar topic fast

New compliance requirement lands on your desk. Prompt: "Explain [FERPA / Title IX / AB 705] in plain language and list the top 5 things a classified employee in [your role] needs to know about it." Gets you oriented in minutes, not hours.

Brainstorming solutions to a workflow problem

Your department gets 50 walk-in students per day but only 2 staff. Prompt: "Suggest 5 ways a community college front-desk office could reduce wait times without adding staff." AI generates options — you and your team evaluate them.

Summarizing long policy documents or reports

New district policy is 18 pages. Prompt: "Summarize the key changes and action items from this policy in a one-page overview for those who don't have time to read the full document." Paste the text (no names/confidential data) and get a usable summary.

Building checklists and process maps

Prompt: "Create a step-by-step onboarding checklist for a new part-time classified employee, covering their first day, first week, and first 30 days — including who to contact at each stage." Saves hours of formatting from scratch.



Student-Facing Support

Explaining complex processes clearly

A student doesn't understand why their financial aid disbursement is delayed. Prompt: "Explain the most common reasons a financial aid disbursement is delayed and what steps a student can take — in simple, calm language for someone who is stressed and confused." You review and adapt before responding.

Drafting referral language and warm handoffs

You need to refer a student to the counseling center but want to frame it supportively. Prompt: "Help me write a warm, non-stigmatizing message referring a student to counseling services, emphasizing that it's a normal, helpful resource." Emotionally intelligent language on a tough topic.

Creating plain-language resource guides

Prompt: "Write a one-page guide for students on how to apply for a fee waiver at a California community college using simple language, numbered steps, and a list of documents they'll need." Great for new students..

Preparing for difficult conversations

Prompt: "I need to inform a student that their appeal was denied. Help me outline the key points I should cover, a compassionate way to open the conversation, and how to present their remaining options." AI helps you structure, while your empathy and judgment deliver it.

Real Scenarios for Classified Professionals

Participatory Governance

Situation: You were just added to a committee halfway through the year and need to quickly understand the committee's work, priorities, decisions, and progress to date.

How AI helps: Upload committee agendas, meeting minutes, charges, and reports. Ask AI to summarize key decisions, identify recurring topics, create a timeline of major actions, highlight unfinished items, and generate a briefing document.

Data and Research

Situation: Your college just completed a climate survey and leadership wants a summary by tomorrow.

How AI helps: Review 100's of comments, identify recurring themes, highlight strengths and concerns, and generate an executive summary.

Classified Senate

Situation: A classified professional wants guidance on becoming a committee chair, Senate officer, or campus leader.

How AI helps: Create a leadership development roadmap and recommend professional development opportunities.

Accreditation

Situation: Your college is preparing for accreditation and needs evidence demonstrating how employee learning and professional development lead to institutional improvement.

How AI helps: Upload professional development presentations, meeting notes, committee reports, and implementation updates. AI can summarize the initiative, identify outcomes, connect the work to accreditation standards, and draft evidence narratives.

PART 3

Responsible Use: Boundaries, Privacy & Ethics

Protecting students, colleagues, and the institution — always.

The Clear Boundaries: What NOT to Put Into AI

🚫 Student Records (FERPA)

Names, IDs, grades, enrollment status, immigration status, financial aid details — anything in a student's record is protected by law.

🚫 Employee Personal Data (HIPAA/Privacy)

Medical info, disciplinary records, salary data, home addresses, or any personally identifying information about staff.

🚫 Confidential Institutional Info

Budget figures in negotiation, legal matters, personnel decisions, unreleased board actions, or anything marked confidential.

🚫 Passwords or System Credentials

Never enter login credentials, security questions, or system access information into any AI tool.

🚫 Third-Party Copyrighted Content

Pasting large blocks of copyrighted text or proprietary vendor materials without permission.

When in doubt — leave it out. Anonymize or generalize before prompting.

AI Makes Mistakes — Always Verify

What AI Can Do Well

- ✓ Draft clear, grammatically correct text
- ✓ Summarize long documents
- ✓ Generate ideas and options quickly
- ✓ Format and organize information
- ✓ Translate concepts into simpler language
- ✓ Help you think through problems

Where AI Falls Short

- ✗ Can "hallucinate" — make up facts confidently
- ✗ May have outdated or wrong policy info
- ✗ Doesn't know your institution's context
- ✗ Can reflect bias from its training data
- ✗ Cannot exercise human judgment or empathy
- ✗ Is not a substitute for professional expertise

Your professional judgment is the quality control layer. AI helps you draft and you ensure accuracy.

Ethical Concerns Every Professional Should Know

Bias in AI

AI is trained on human data — which contains human biases. Results may reflect racial, gender, or socioeconomic stereotypes. Always use your own judgment.

Privacy Risks

What you type into public AI tools may be used to train future models. Treat every prompt like a public post — if you wouldn't share it publicly, don't put it in AI.

De-skilling Risk

Over-relying on AI can erode your own critical thinking and writing skills. Use it as a starting point — not a replacement for your own expertise.

Environmental Concerns

AI can improve efficiency, but it also increases demand for energy, water, and computing resources. Use it intentionally where it adds the greatest value.

Access Inequality

Not everyone has equal access to AI tools. Be mindful of assuming all students or colleagues can use these tools the same way.

Your Responsibility

When you submit AI-assisted work, it's still your work. You are accountable for its accuracy, appropriateness, and professionalism.

Before You Use AI: A Quick Decision Framework

Ask yourself these 4 questions every time:

1

Does my prompt contain private or protected data? If YES → Remove or anonymize it first. Never include real names, IDs, or protected info.

2

Is accuracy critical for this task? If YES → You must verify every fact AI produces. Double-check dates, policies, procedures, and figures.

3

Is AI use appropriate in this context? If UNSURE → Check your institution's AI use guidelines or ask your supervisor.

4

Will I review and take responsibility for the output? If YES → You're using AI responsibly. The output is yours — own it.

When in doubt: pause, check policy, or ask. That pause IS professional judgment.

PART 4

Prompting That Actually Works

The quality of what you get depends on what you ask.

The Prompt Formula: Getting Better Results

ROLE	TASK	CONTEXT	FORMAT
Who should AI act as?	What do you need done?	What details matter?	How should it look?
<i>"Act as an educational advisor..."</i>	<i>"...draft a professional email..."</i>	<i>"...to a student asking about late enrollment..."</i>	<i>"...in 150 words, friendly tone."</i>



Full Example Prompt:

"Act as a college educational advisor. Draft a friendly but professional email to a student who missed the enrollment deadline, explaining their options and next steps. Keep it under 150 words with a friendly, encouraging tone."



Pro tips: Be specific. Longer prompts = better results. If the first response isn't right, say "Make it shorter" or "Try a different approach" — you can keep refining.

Practice Activity – Try It Yourself



Write a prompt using the Role-Task-Context-Format formula

ROLE

Who should AI act as?

TASK

What do you need done?

CONTEXT

What details matter?

FORMAT

How should it look?



PART 5

What Comes Next: Agentic AI and Your Role

AI is changing fast and here's what it means for classified professionals.

What Agentic AI Means for Classified Roles

Agentic AI doesn't just answer questions — it takes actions. The classified professionals who understand this will shape how it gets used responsibly.

AI That Acts

Agentic AI can schedule meetings, draft and send emails, file documents, and search systems — without a prompt for each step. It's already rolling out in Microsoft 365, Google Workspace, and campus tools.

Guardrails Become Critical

When AI acts autonomously, the boundaries you set upfront matter more than ever. What can it access? What decisions require human approval? Classified are often the ones who set these limits.

Human in the Loop

Best practice keeps humans approving key decisions — especially anything touching student records, money, or communications sent on behalf of the institution. Your role in that chain is not optional.

Equity and Transparency

As agentic AI becomes more common in higher education, classified professionals should advocate for equitable access to AI tools and training while understanding how AI is used in workplace processes.

Policy Lag Is Real

Adoption is outpacing the rules governing it. If AI is in use without review, it's already shadow AI. Asking “What’s the policy on this?” is an act of leadership, not resistance.

Stay Curious and Current

Agentic AI is moving fast. Committing to keep learning — even just 20 minutes a week — builds the expertise you need to remain informed, involved, and ready to navigate change.

You Are Already a Leader — AI Makes It Visible

Classified professionals are often the first point of contact for students and colleagues. As AI changes campus operations, how you engage with it — responsibly and transparently — sets the tone for your department and institution.

1

Model transparency: When you use AI, say so. "I used AI to draft this — let me know if anything seems off." That builds trust.

2

Guide colleagues: When teammates ask about AI, you can share what you've learned here: what's safe, what's not, and how to verify.

3

Protect students: Students will ask you about AI. Being informed means you can give them honest, responsible guidance — not just "yes" or "no."

4

Ask good questions: Leadership doesn't always have answers. Asking "Should we be using AI for this?" or "Have we thought about privacy?" is valuable.

5

Be a part of the conversations: As AI becomes more common in higher education, staying informed helps ensure your voice is included in shaping how these tools are used.

PART 6

Wrap-Up, Action Plan & Q&A

Leave today with something you'll actually use.

Key Takeaways

01

AI is a tool — you are the professional.

Your judgment, expertise, and accountability never gets delegated to a machine.

02

Protect private data first, always.

FERPA, HIPAA, and institutional policy aren't suggestions — know what to keep out of AI.

03

Better prompts = better results.

Use the Role–Task–Context–Format formula. Refine. Experiment. Get good at it.

04

Always verify before you trust.

AI can be wrong confidently. Every factual claim needs your professional review.

05

AI literacy is a career skill.

Investing in this now positions you for growth, leadership, and resilience across your career.

My AI Action Plan – This Week

Sometime today, I want you to create your AI action plan for the week:

One task I could use AI to help with:

One boundary I will always maintain:

One colleague I'll share something from today with:

Progress builds momentum. One small step this week leads to real capability within a month.

Tools to Try & Resources to Explore



Free AI Chat Tools

- ChatGPT — chatgpt.com
- Claude — claude.ai
- Microsoft Copilot — copilot.microsoft.com
- Gemini — gemini.google.com
- Poe — poe.com or Arena AI — arena.ai (multiple models)
- Notebook LM — notebooklm.google.com



Learn More

- ACUE – Association of College and University Educators (AI in Higher Ed training, often institution-sponsored)
- LinkedIn Learning: AI Literacy (VRC or free w/ library card)
- California Community Colleges Chancellor's Office – ai.cccco.edu & onlinenetworkofeducators.org
- Training Magazine Network – trainingmagnetwork.com
- Coursera: AI For Everyone (free audit)



At Your Institution

- Check your district's AI use policy
- Ask your supervisor about approved tools
- Look for Professional Development offerings
- Connect with your IT department for guidance
- CCCCO Vision 2030 AI resources



Always verify that any tool is approved for institutional use before inputting work-related content.

You're Already a Thoughtful Professional.

Move forward with curiosity and discipline.

Stay open, but stay thoughtful.

Protect what matters while you explore what is possible.

Questions & Discussion

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