

Use of Artificial Intelligence: Sustaining Selfhelp's High-Touch, High-Quality Approach to Client Care

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Selfhelp



Now celebrating our 90th year, Selfhelp Community Services is an innovative and forward-thinking not-for-profit organization whose mission is to support the independence and dignity of older adults. From our earliest days, we have developed new models to enhance our work, from creating welcoming housing for traumatized refugees to implementing extraordinary supportive services that enable frail individuals to continue living independently.

In the past two decades, we have expanded this philosophy to embrace the promise of new technological approaches to care. Our flagship Virtual Senior Center was seeded by an innovation grant from Microsoft, providing homebound older adults with face-to-face camaraderie years before Zoom became a household name. Some of our clients have worked with us to test new innovations, even as we continue to provide basic instruction to others who seek to enter the digital world. We are also developing a new database infrastructure that enables us to better coordinate care for our clients, both through social services and in collaboration with their health care team.

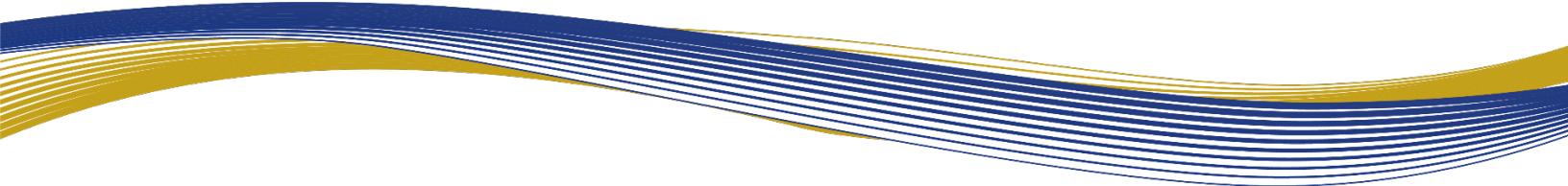
Indeed, our mission statement reads, in part, that we will “lead in applying new technologies to address changing needs of [our] community.” Artificial intelligence is now impacting all personal and business aspects of the world we live in. And, it shows promise to further improve the care we can provide.

Our Approach

A spirit of curiosity informs Selfhelp's work with artificial intelligence, centered in our commitment to providing compassionate, trusted, and innovative care.

Our explorations are grounded in our core values:

- **We welcome and include all.** Our diverse staff critically review any AI-generated materials.
- **We think big.** We are examining how AI can help automate certain tasks so that we can focus on our essential commitment to delivering care.
- **We connect with compassion.** We are people, first. Our relationships with older adults are the foundation of our work.
- **We build trust, always.** Our policies and firewalls protect personal information.
- **We balance head and heart.** Our goal, always, is to employ human-centered modalities even in a tech-forward environment.



Our Core Principles

In 2024, Selfhelp undertook a comprehensive examination of how AI could be used to support and improve organizational operations. This effort was guided by three core principles:

1. Selfhelp is a human services organization, and as such we must continue to center our person-to-person support of staff and clients. AI is a tool for enhancing this work. As a trauma-informed organization, we are sensitive to our clients' concerns about its use.
2. Because of its ability to rapidly assemble and analyze information, AI has the potential to bring efficiencies to Selfhelp's work.
3. As in the early days of the internet, there is substantial investment being made in AI technology. While this leads to many exciting possibilities, many current products may evolve substantially or disappear in time. It will be necessary to be open to exploration and opportunity, and flexible in seeking to incorporate AI into Selfhelp's work.

Our Exploratory Work

A group of staff from all levels, across Selfhelp, met regularly to explore the uses of ChatGPT 4.0, with professional licenses granted by the Fund for the City of New York. The discussion found that ChatGPT can yield substantial efficiencies for certain tasks, and that it is important to balance these efficiencies with our organizational values.

- **Generating content:** We were excited by the potential of large language models to rapidly draft written material. Yet we also recognize that all such drafts must be critically reviewed and edited for their thoroughness, accuracy, and style. Regardless of whether a person or large language model creates the first draft, our written documents represent Selfhelp authentically.
- **Summarizing information:** Generative AI proved useful in producing clear, concise summaries of complex material such as legislative developments and academic literature. However, critical evaluation of AI outputs remains vital, knowing that their accuracy and source reliability can vary.
- **Building capacity:** We found that Chat GPT could successfully create a high-level template that would serve as a simplified guide to launching a new project. It is tempting to treat these systems as experts, since they have access to expertise from across the internet and continuous learning capacity. Again, we found that the generated recommendations were useful for novice engagements with new topics, but must be paired with our staff's high-level expertise.

Implications

Without question, generative AI can create significant efficiencies and productivity gains in some of Selfhelp's daily work. As well, there are opportunities to automate repetitive processes that detract from the one-to-one relationships that are the hallmarks of Selfhelp's work.

Subsequent to the exploration of ChatGPT described above, Selfhelp has begun investigating the use of note-taking software to aid in the completion of required documentation, as well as various scheduling applications for home health care and field visits.

In all this work, it remains our view that efficiency must be tempered by our longstanding commitments, including:

Accuracy. It is essential for a person to review AI-generated content and to read and interpret the information that the system used to craft its response.

Privacy Protection (HIPAA). Selfhelp's organizational policies prohibit entering personally identifiable client information into generative AI. Current versions of the software do not have strong protections for this information, which leaves our clients vulnerable to identify theft. We are installing additional software to address compliance considerations.

Skills development. While ChatGPT can do the work of an intern or early-career professional, assigning it these tasks reduces opportunities for new people to come into the field. Some of the very steps that ChatGPT excels at – summarizing content and drafting written material – are usually taken on by early career hires who learn information about the field, written conventions, and critical thinking skills by engaging with these tasks. Using ChatGPT to accomplish these tasks can mean that fewer people receive a valuable form of on-the-job training, a need that we are instilling other measures to address.

Client support. The hallmark of Selfhelp's approach is personalized, one-on-one relationships which build trust and encourage the client to receive services. Efficiencies introduced by AI can support this work, but care must be taken to keep our connection with our clients at the center of our approach.

Interim Wrap-Up

We have engaged with the experiences of other community-based organizations. Many are assessing the use of AI to improve their business workflows and for use in their systems of record. Some others are rejecting the use of AI in their operations due to a lack of trust in how the models are trained and how information is used.

One strong lesson of the staff working group is that experimenting with AI is a method of developing trust. In conversations during working group sessions, many participants moved from skepticism to amazement to a more nuanced sense of how to use generative AI effectively and appropriately.

As AI tools continue to evolve, it is likely that additional use cases will soon emerge. It will be necessary to continuously revisit these ideas to ensure that we are utilizing AI appropriately, and incorporating its use at a pace and capacity that remain true to our core principles.

