

How to use this Worksheet: Work through each section after the session. Be specific—vague ideas don't lead to action. The goal is to leave today with one clear next step you will take this week to better serve your mission using AI.

I. Where are you right now?

Before we talk about what's next, let's get honest about where friction exists in your organization.

The task our team repeats most often that doesn't require real judgment:

The administrative bottleneck slowing down our ability to serve (meetings, reporting, emails, etc.):

Approximate hours per week lost to administrative work:

Number of team members affected:

Mission Impact Reflection

Hours lost per week × Team members × 52 weeks = total hours lost annually.

What could your organization do with that time back?

(More families served? More programs delivered? Deeper relationships built?)

Notes:

II. Your S.C.A.L.E. Audit

Rate your organization on each pillar (1 = not addressed, 5 = fully built), then write one specific gap or opportunity.

	Pillar	Rate yourself (1–5) & Where's your biggest gap or opportunity?
S	Storytelling	<p>Are we clearly communicating our mission and impact in a way that inspires donors, volunteers, and partners? Do our reports, campaigns, and stories move people to action?</p> <hr/> <hr/>
C	Consistency	<p>Are our donor communications, grant reports, and messaging consistent across platforms? Do we have human oversight of AI-generated content?</p> <hr/> <hr/> <hr/>
A	Access & Dignity	<p>Are we using AI to remove barriers—not create them? Are accessibility, inclusion, and dignity built into how we serve?</p> <hr/> <hr/>
L	Leadership Presence	<p>Are our leaders focused on vision, relationships, and strategy—or consumed by administrative work?</p> <hr/> <hr/>
E	Efficiency	<p>Are we using AI to reduce manual work and free up time for mission-driven activities? How much time is spent reading, summarizing, reporting, or researching?</p> <hr/>

III. Tool Match - Where do you start?

Based on the five tools covered today, write the one workflow where each tool would have the most immediate impact in your organization.

#	Tool	The workflow where this tool would save us the most time:
1	Claude (Anthropic)	Which grant, report, proposal, or strategic document takes too long to create or analyze? _____ _____ _____
2	Microsoft Copilot/ Google Workspace	Which part of your daily workflow (email, documents, spreadsheets, collaboration) creates the most friction? _____ _____
3	ChatGPT + Atlas	What research, donor communication, program content, or planning work takes your team the most time? _____ _____ _____
4	Ray-Ban Meta Wearables	Where does technology interrupt presence with the people you serve, your team, or your community? _____ _____
5	Notebook LM (Google) Agentic AI	Which reports, grant materials, or internal documents take the most time to read, synthesize, or understand? _____ _____

The Pilot Principle: Don't start with five tools. Start with the one workflow where you gave the most specific answer. That becomes your 30-day pilot.

IV. Your 90 Day Plan

Fill in each phase with the specific action you will take — not what sounds good, but what you will actually do.

<p>DAYS 1-30 Audit & Pilot</p> <ol style="list-style-type: none"> 1. Identify where your team slows down most 2. Choose ONE workflow + ONE tool 3. Measure how long it takes today 	<p>DAYS 31-60 Measure & Govern</p> <ol style="list-style-type: none"> 1. Define success metrics (time saved, responsiveness, engagement) 2. Create a simple AI usage guideline 3. Train your team on your chosen tool 	<p>DAYS 61-90 Scale & Connect</p> <ol style="list-style-type: none"> 1. Expand to one additional workflow 2. Begin integrating AI into daily operations 3. Model usage as a leader—give your team permission to adopt
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Days 1-30 First Action:

Days 31-60 First Action:

Days 61-90 First Action:

Reflect Internally: How are you feeling at this point? Are you utilizing AI to help or hinder your organization?

V. Governance Before You Scale

Check each box when your org. has addressed it. Remember, governance is what makes speed sustainable.

	We have defined human review for donor-facing and public content
	We have a clear and consistent brand voice
	We have basic AI usage guidelines in place
	We understand how AI will (and will not) be used with sensitive data

VI. The 4 Questions to Bring Back

These are the questions Andrew asked you to take back to your team. Write your initial answers now — they'll anchor your first conversation.

1. Where are we losing time that could be redirected to mission?

2. Which tool do we pilot first? (Based on today — be specific)

Reflect Internally: Are you feeling excited as you begin to consider the ways you can leverage AI to pour into your clients / services / relationships more and automate the mundane as much as possible?

VI. The 4 Questions to Bring Back (Continued)

These are the questions Andrew asked you to take back to your team. Write your initial answers now — they'll anchor your first conversation.

3. Who needs to model this? (Which leader's visible AI use would give the team permission?)

4. What's our governance baseline? (What needs to be in place before we scale?)

VII. Your Next Single Step

The organizations that succeed with AI don't try everything at once.
They do one thing well and build from there.

One action. One tool. One person. One deadline. Fill in the blanks below:

I will:

by (date):

with (tool or person):

Are you using AI to simply move faster—or to serve more deeply?

Remember Andrew's life motto: We will be known by the problems we solve.

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