

HANDSON NWNC · SUSTAINABILITY SERIES

Capacity *without* collapse.

Practical AI workflows for nonprofits
navigating transition, designed for
steadiness, not speed.



LUR GROWTH

THE NONPROFIT THRIVE ARCHITECT™

A 2-HOUR INTERACTIVE WORKSHOP

PRESENTED BY

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*Founder & CEO, LUR Growth
Nonprofit strategic advisory partner*

DATE

Tue · May 12, 2026

TIME

9:00 – 11:00 AM

VENUE

Intergenerational Center · Room 209

WELCOME

You are *already* doing the work.

This is a peer-to-peer working session, built for leaders who are already carrying too much, and looking for ways to set some of it down without dropping the mission.

IN THE NEXT TWO HOURS

- 01 **Name** where capacity is being drained.
- 02 **Map** your Requests & Follow-Up Capacity Flow.
- 03 **Stabilize** one workflow with AI as infrastructure.
- 04 **Leave** with a plan you can apply this week.

A QUICK HELLO

I'm *Latoya*. I've sat where you're sitting.

I am a longtime nonprofit Executive Director, the founder of LUR Growth, and a strategic advisory partner to leaders and boards designing capacity-building infrastructure that lasts.

“What I do, with leaders and boards, is design and activate the infrastructure that protects people, strategy, and mission continuity.”

20

YEARS

In the nonprofit sector.

Programs, fundraising, operations, and the late-night work in between.

15+

YEARS

As an Executive Director.

Carrying the inbox, the funder relationships, and the institutional memory.

M.S.

PRACTICE

Workflow design & implementation.

Practical, low-jargon systems leaders can actually maintain.

AI

FOCUS

Responsible AI as infrastructure.

Reducing pressure on people; protecting funder and community trust.

LATOYA U. ROBINSON, M.S. • FOUNDER, LUR GROWTH

WHAT YOU SENT ME

Today's agenda is *your* pre-work.

Seven of you sent me a warm-up before today
— I read every word. Names and organizations
stay anonymous, but here is the room, in your
own language.

01

What you're holding alone

- Daily financial decisions & grant balances
- The one system login no one else has
- Data & evaluation reporting that anchors our funding
- Board prep — hours every month
- Supervision + strategy + an event at once
- Program details that "depend on me"

02

Where workflows break

- Follow-up
- The middle of onboarding
- Delivery days — one wrong thing stalls the crew
- Digging through old emails for what was said
- "It depends on me"
- Standing up a new tool the team must learn

03

What you want from today

- A clear picture of what I can hand off
- Tools that handle the redundant tasks
- Knowing the day will go right — volunteers, addresses, parts
- Less stress that something will drop
- To understand AI's role in our work
- Time back for the bigger picture

01

Before we talk about systems, we have to be honest about the moment we're in.

THE PROBLEM

The sector has a *systems* problem.

Funding is uncertain. Staff is shifting. Accountability is rising. And most of us are still running strategy, follow-up, and continuity on people alone.

Three pressures, all at once.

01

Funding uncertainty.

Grant cycles compress. Renewals slip. Multi-year commitments quietly become single-year. Cash flow is harder to forecast than at any point in the last decade.

02

Staffing shifts.

Tenured staff leave. New hires take six months to ramp. The person who held the spreadsheet, the relationships, the inbox, gone, often without a replacement.

03

Rising accountability.

Funders want clearer outcomes. Boards want sharper reporting. Communities want faster response. The bar is rising while the bench is shrinking.



When the mission depends on one person remembering everything, the mission is one bad week away from breaking.

LATOYA U. ROBINSON · FOUNDER, LUR GROWTH

Burnout

The leader carrying continuity is the first to break.

Dropped balls

Donor follow-ups, board commitments, program details, silently lost.

Knowledge loss

When someone leaves, the institution forgets, because nothing was ever written down.

REFRAME

This workshop is
not **about**
efficiency.

We are not here to make you faster, busier, or more "productive." We are not here to add another dashboard or another tool.

STEADINESS *over speed*

CLARITY *over volume*

SUSTAINABILITY *over heroics*

ACTIVITY · 5 MINUTES · PAIR SHARE

Which pressure is hitting your org *hardest* right now?

Before we look at the drain inside the building, let's name the weather outside.

TURN TO YOUR NEIGHBOR

- A** Pick **one** of the three pressures: funding, staffing, or accountability.
- B** Name the **moment** in the last 30 days where you felt it most.
- C** Ask each other:
"If this stays the same for six more months, what breaks?"

No fixing. No advising. Just naming. We'll come back to it.

02

The drain is rarely loud. It's the meeting that needed three follow-ups and got one.

WHERE CAPACITY GETS DRAINED

Most of the loss is *invisible.*

Burnout is not caused by the work you can see. It's caused by the work nobody assigned, nobody tracked, and nobody noticed, until it didn't get done.

Where the capacity actually goes.

Not bad people. Not lazy teams. *Patterns*, recurring shapes that show up in nearly every nonprofit during transition.

01

Requests pile up.

Every channel, email, text, hallway, board chat, feeds the same one inbox: yours.

02

Decisions loop.

The same question gets reopened in three meetings because no one wrote down the answer.

03

Follow-up vanishes.

Action items live in someone's head, not in a system. They get done, or they don't.

04

Continuity rests on one person.

One leader holds the whole map. When they're sick, on vacation, or gone, the map goes with them.

INVISIBLE LABOR

The work that *holds* the org together.

None of these show up on a job description. All of them show up when they stop happening.

REMEMBERING WHAT WAS
PROMISED

TRANSLATING BOARD TO STAFF

READING THE FUNDER'S SILENCE

CATCHING THE TONE OF AN EMAIL

KNOWING WHO NEEDS A HEADS-UP

RECONCILING TWO CALENDARS

REOPENING THE CLOSED LOOP

HOLDING THE INSTITUTIONAL
MEMORY

DRAFTING THE THANK-YOU

RE-EXPLAINING THE VISION

You can probably name three more before I finish this sentence.

ACTIVITY · 6 MINUTES

Where is your capacity being *drained* this week?

ON THE WORKSHEET AT YOUR TABLE

- A** Name **three things** you're personally holding that nobody else in your org could pick up tomorrow.
- B** Circle **one** that, if dropped, would cause real harm.
- C** Mark the **channel** it lives in: email, head, calendar, sticky note, slack, nowhere.

THEN TURN TO YOUR NEIGHBOR.

"What's the one I named, and where does it actually live?"

03

Every organization already has a flow. Most just haven't drawn theirs yet.

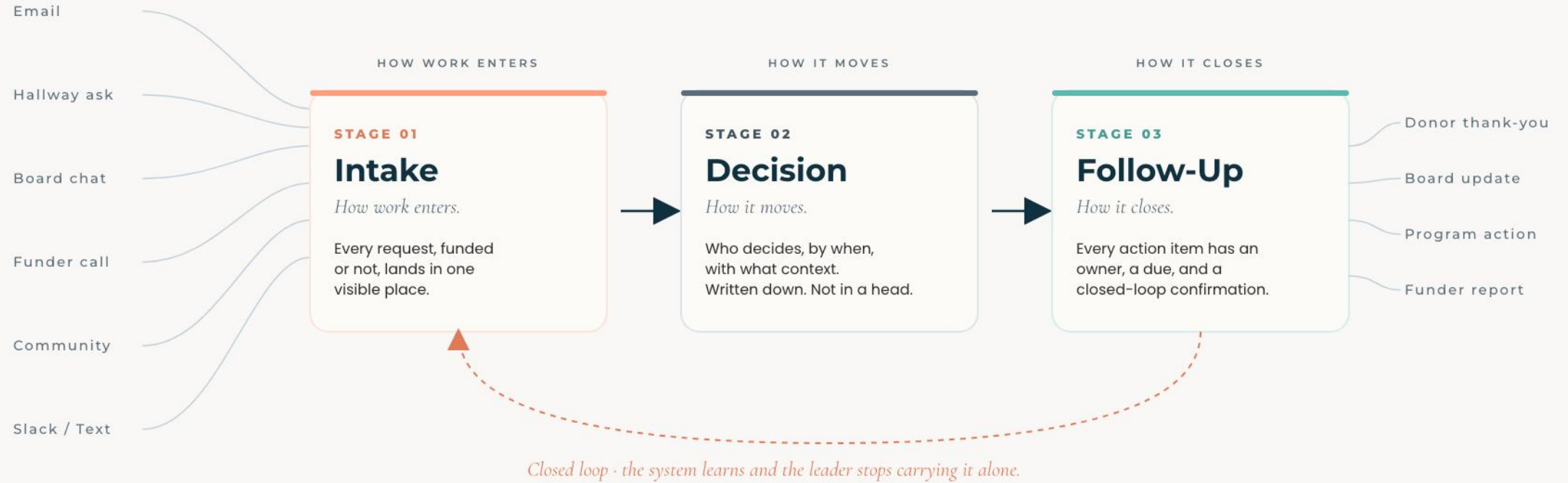
CORE FRAMEWORK

The Requests & Follow-Up

Capacity Flow.

A simple, three-stage map of how work enters your organization, how decisions get made (or don't), and how follow-up gets closed (or vanishes).

How work moves through your organization.



Five questions. One workflow at a time.

Pick one workflow you know is leaking, donor follow-up, hiring, board prep, and walk it through these five questions. The drawing is the work.

01

INTAKE

Where does it enter?

Email, text, hallway, calendar, form. Name every channel, even the awkward ones.

02

TRIAGE

Who sorts it first?

If the answer is "me, in my head," circle it. That is the drain.

03

DECISION

Who decides, by when?

A real name and a real date. "Soon" is not a date. "We" is not a name.

04

ACTION

Where is it written?

If a future you couldn't find it in 30 seconds, it isn't written down.

05

CLOSE

How does it close?

A confirmation back to the requester. Otherwise the loop never closes, even if the work got done.

From reactive operations to designed infrastructure.

One of you is hiring this week. This one is for you.

BEFORE · REACTIVE

Onboarding lives in the founder's head.

- New hire shows up Monday. Orientation covers what comes to mind that day.
- Week two, someone realizes they were never shown the shared drive.
- Founder answers the same five questions for six weeks straight.
- The 30-60-90 conversation never happens because there's no map.
- The new hire's "ramp" depends on the founder's calendar that month.

AFTER · DESIGNED

Onboarding lives in a system.

- A standing onboarding doc with the five things every new hire needs in week one.
- AI drafts a welcome packet from the job description and team norms — founder edits in 10 minutes.
- A 30-60-90 template, pre-filled, ready for the first one-on-one.
- Founder's calendar isn't the ramp. The system is the ramp.
- The next hire doesn't start from scratch — they inherit the doc.

ACTIVITY · 12 MINUTES

Map your *own* Capacity Flow.

Pick the workflow you circled earlier. We'll walk it through Intake → Decision → Follow-Up together.

ON THE BACK OF YOUR WORKSHEET

STEP 1 · 3 MIN

Sketch the three boxes. Label them **Intake**, **Decision**, **Follow-Up**.

STEP 2 · 4 MIN

For each box, write where it actually lives today, and who holds it.

STEP 3 · 5 MIN

Mark with a star ★ the one box where this workflow most often breaks.

We'll come back to your starred box in the next section.

04

AI is not a person. It is plumbing. The question is whether the plumbing protects the people.

AI AS INFRASTRUCTURE

For care.
Not **for efficiency**
theater.

Used responsibly, AI is a quiet structural support: it remembers, drafts, and surfaces, so the people in your organization can do the work only people can do.

A 60-SECOND ORIENTATION

Before we go further — what *is* this thing?

If you've never opened one of these tools before — and several of you wrote me to say you haven't — this is for you. No catching up required.

01

It's a website you log into.

chatgpt.com · claude.ai. You type, it answers. No download, no install. Free tier on both.

02

It writes back in plain English.

Ask it the way you'd ask a smart colleague. "Help me draft a thank-you to a donor who gave us \$500 last spring."

03

It's a draft, not a send.

You read it. You change what's wrong. You decide whether it leaves the building. That's the whole job.

If you only do **one** thing after today: open one of the two URLs above and ask it to help you with the single workflow you mapped in the last activity.

What this looks like in *my* week.

I'm not asking you to do anything I'm not already doing, with the same guardrails, on real client work.

AS A NONPROFIT ED

Inside the building, on the hard weeks.

- **Grant calendar & reporting.** Deadline tracking, first-draft narratives pulled from program notes for me to verify.
- **Board prep.** Pre-meeting briefs, post-meeting decision logs — nothing reopened next month.
- **Donor stewardship.** Thank-you drafts informed by giving history. I sign and send.
- **Staff & volunteer follow-up.** Commitments tracked across channels so nothing lives only in my head.

IN MY CONSULTING

Quiet scaffolding behind a one-person shop.

- **Inbox triage.** AI sorts client requests, surfaces what actually needs me, and drafts the rest.
- **Meeting prep & recap.** Briefs before, summaries after — every commitment captured.
- **First drafts in my voice.** Proposals, frameworks, follow-ups — always edited by me before they leave.
- **Knowledge memory.** A private library of my past work I can search like a colleague who never forgets.

WITH NONPROFIT PARTNERS

Built with you, never bolted on.

- **We map first.** No tools until the Capacity Flow is on paper and the broken stage is named.
- **One workflow at a time.** Donor follow-up, or board prep, or hiring — not all at once.
- **Humans always send.** AI drafts, summarizes, reminds. Staff edits, approves, and keeps the relationship.
- **Written guardrails.** A one-page AI use policy your board, staff, and funders can all read.

What AI *should* and *should not* do.

IN YOUR NONPROFIT	YES · AI AS INFRASTRUCTURE	NO · AI AS REPLACEMENT
Donor relationships	Draft a thank-you informed by past gifts and notes, for a human to edit.	Auto-send a thank-you with no human read of the tone or context.
Meeting prep	Summarize a long thread, surface decisions and open questions for the agenda.	Replace the actual conversation with an AI-generated decision.
Email follow-up	Track which threads are unanswered, draft check-ins, surface stuck ones.	Send program responses to community members without staff review.
Reporting	Pull program data into a draft funder report, for the ED to verify and finalize.	Submit auto-generated impact numbers without human reconciliation.
Sensitive cases	Flag a complex situation. Stay out of the response.	Generate guidance for survivors, clients, or vulnerable communities.

FOUR WORKFLOWS YOU CAN START THIS WEEK

Small. Specific. Reversible.

Each one reduces tool overload, protects continuity, and is safe for non-tech-savvy teams to adopt.

01 FOLLOW-UP TRACKER

Every commitment, in one place.

Scans recent meetings and emails for open "I'll get back to you" promises — surfaces them in a weekly digest you actually read.

For the person who goes back through old emails to find what was promised.

Try → "From these notes & emails: [paste], list every 'I'll follow up' I made and who's waiting."

02 MEETING PREP

A 2-page brief in two minutes.

Before each meeting, AI assembles history, last commitments, and three questions worth asking — drafted, not sent.

For the person spending hours every month on board meeting prep.

Try → "From these notes: [paste], draft a 1-page brief for my board meeting. End with 3 questions worth asking."

03 EMAIL DRAFTING

A starting point, never the send.

For routine asks, AI gives a respectful first draft in your voice. You edit the human parts and send.

For the leader kept up by "tasks not getting done correctly or completely."

Try → "Draft a warm, brief reply in my voice — I'll edit before sending: [paste email]"

04 DONOR ACKNOWLEDGMENT

Nothing slips. Nothing feels canned.

Each gift triggers a personalized draft from the donor's history and notes. You review, edit, send within 48 hours.

For when stewardship rests on one person — and one bad week breaks the cadence.

Try → "Write a thank-you to [name], who gave \$[amount]. Past gifts & notes: [paste]. Warm, specific, not canned."

● LIVE DEMO · OPTIONAL · ONLY IF WE HAVE THE TIME

WATCH THIS ONCE

Let me actually *do* one of these, in front of you.

I'll take the workflow this room cares about most, open the tool, and run the starter prompt — live, unedited, mistakes and all. You watch the rhythm: **ask → read → edit → you decide.**

WHAT YOU'LL SEE

- 01 A real example — pulled from your pre-work, not a demo script.
- 02 The prompt, typed in plain English — the same one on the workflow card.
- 03 The first draft — and me deciding what's wrong with it.
- 04 Where the human stays in — tone, judgment, the send button.

If we're tight on time, this is the first thing I skip — and you already have every prompt you need to do it yourself.

A PRACTICAL ASIDE • TOOLS

You don't have to *build it yourself*.

At LUR Growth I build custom infrastructure for clients who want it — but you don't have to. **One well-chosen system**, set up cleanly, can carry you a long way.

BEST-KNOWN • ALL-IN-ONE

\$125+/MO

Bloomerang

Donor CRM, email marketing, online giving, retention scoring. Priced by record count. Volunteer & Giving Platform sold separately.

Strong fit: 1k–5k records, want one polished platform, light grant work.

LEAN & AFFORDABLE

\$45+/MO

Little Green Light

Transparent published pricing. Donor records, mailings, gift entry. Less polish, fewer bells & whistles, much lower overhead.

Strong fit: small budget, one fundraiser, want to be live in under a week.

MODERN • AI BUILT-IN

\$130+/MO

Keela / Aplos

Newer all-in-ones with AI assists for emails and reports baked in. Pricing tiered by contacts, in line with Bloomerang.

Strong fit: you want AI inside your CRM, not alongside it.

Buy

Subscribe to a system

PROS

- Live in days, not months
- Vendor handles updates & security
- Real support & user community
- Clean funder & audit story

CONS

- Recurring monthly cost
- Pricing rises with your records
- Workflows fit their model, not yours
- Add-ons quietly stack up

Build

Build something internal

PROS

- Fits exactly how you work
- No per-record pricing tiers
- You own the data, fully
- AI lowers the build cost dramatically

CONS

- Someone has to maintain it
- Security & backups are on you
- Funders may ask harder questions
- Bus-factor risk if the builder leaves

My honest take: **I build my own — that's the work at lurgrowth.com**. But a clean off-the-shelf tool is a real, valid choice. The wrong move is staying stuck between the two.

One tool. Used *well*.

You don't need a stack. You need **one** thinking partner you trust — and the discipline to actually open it.

START HERE · THE DAILY DRIVER

Claude Chat

The one I open every morning. Drafting, summaries, board prep, the hard email you've been avoiding. Ask it the way you'd ask a sharp colleague — in plain English.

claude.ai — the free tier is enough to start. **chatgpt.com** works too if that's what you already have. Pick one. Open it tomorrow.

If you take one thing from today, take this.

THE ONE UPGRADE

Claude Projects

A private workspace per topic — one for the board, one for a grant, one for a program. Load the context once; it remembers it every time you come back.

When a single chat window stops being enough — not before.

• EVERYTHING ELSE · ASK ME, DON'T MEMORIZE

Artifacts · Cowork · scheduled actions · Code & Routines · custom builds · ChatGPT for images · Perplexity for research · VS Code / GitHub / Netlify for things you build

These are real and they're powerful — and they're a **Part 2**, not today. When your Capacity Flow map shows you actually need one of them, that's the conversation. I'm building one of these in the open right now (**Hermes Agent**) so you can watch how the sausage gets made before you'd ever adopt it.

You don't need to be *tech-savvy* to do this responsibly.

You need clear rules, a small set of tools, and the steady habit of keeping people in the loop where it matters.

01

A human always sends.

No external message, to a donor, funder, partner, or community member, leaves without a person reading it.

02

No personal data in tools you don't trust.

Donor records, client cases, HR, only in vetted, contracted tools. We'll show you the short list.

03

Disclose where it matters.

Funders increasingly ask. A one-line policy in your operations doc protects trust and gets ahead of the question.

04

Fewer tools, integrated well.

One CRM, one calendar, one inbox, one doc system, connected. Not seven things AI tries to bridge.

ACTIVITY · 6 MINUTES · SOLO + SHARE

Pick your *one* AI workflow. And one guardrail.

We've seen the four. Now choose the one
that matches the box you starred. Small.
Specific. Reversible.

BOTTOM OF YOUR WORKSHEET

STEP 1 · 2 MIN · PICK ONE

Circle one: **Follow-Up Tracker** · Meeting Prep · Email Drafting · Donor Acknowledgment.

STEP 2 · 2 MIN

Name the human in the loop.
Who sends, who reviews, who
keeps the relationship.

STEP 3 · 2 MIN

Write your one-line guardrail.
The thing that stays human, no
matter what.

Then share with your neighbor. One sentence each.

FROM ACTIVITY TO ACTION

Your *first* prompt.

You picked a workflow and a guardrail. Here's the exact thing to paste — fill the brackets, send it tonight.

PASTE INTO CLAUDE.AI OR CHATGPT.COM — REPLACE THE BRACKETS

I run [my role] at a nonprofit. One workflow that keeps leaking is [the workflow you picked], and it most often breaks at [intake / decision / follow-up].

Here's the raw material: [paste your notes, emails, or the messy version].

Help me with a first draft. Keep it [warm / brief / plain]. I'll edit before anything leaves the building — the part that stays human is [your guardrail].

IF NOTHING COMES OUT RIGHT

Tell it what's wrong in plain words: "too formal," "you missed X," "shorter." It revises. That's the loop.

IF YOU ONLY DO THIS ONCE

Once is the win. The habit is next month's problem. Today, just get one draft you didn't start from scratch.

WHEN IT GETS BIGGER THAN THIS

A workspace that remembers, a system that runs it, a custom build — that's the engagement. **That's where I come in.**

APPLICATION · 15–20 MIN

Start *small.* Start this week.

One workflow. One owner. One closed loop. That's enough to begin.

BY FRIDAY

Refine your Capacity Flow map.

Spend 30 minutes finishing the diagram you started here. Show it to one other person on your team.

Your pre-work already named the workflow — don't restart. Finish the one you sent me.

WITHIN 2 WEEKS

Stabilize the starred box.

Give the broken stage one home, one owner, and one written-down standard. AI can wait, the system is the win.

WITHIN A MONTH

Add one AI-assisted workflow.

Pick the lowest-stakes one from today's four. Give it 30 days, with a human always in the loop.

The mission should not depend on one
person
remembering everything. It should rest on
infrastructure that holds, even on the hard
weeks.

STEADINESS · CLARITY · SUSTAINABILITY

THANK YOU

Let's keep building *capacity* that holds.

*Supporting leadership and boards in designing and
activating capacity-building infrastructure that
protects people, strategy, and mission continuity.*



LUR GROWTH

THE NONPROFIT THRIVE ARCHITECT™

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