A WORKSHEET FOR NONPROFIT AND EDUCATION TEAMS

From "Who does the work?" to *"What to delegate to AI?"*

Fill it in together at your next staff meeting, then pick one task to start with.

1 · THE LITMUS TEST

Does this task need their full expertise?

IF YES

The person keeps the call

The agent helps with the prep. A conversation with a donor, a conversation with a client, a hiring decision.

IF NO

It is a candidate

Hand it off, and review what comes back. The monthly reports, intake follow-ups, research for grants.

2 · WHERE THE OPPORTUNITIES HIDE

Four places to look first

01 **Gatekept information**

It lives with one person. Getting it means asking.

OURS _____

02 **The task everyone complains about**

Everyone wants it easier. Nobody owns the fix.

OURS _____

03 **The repeating loops**

Recurring reports, triggered follow-ups, status checks.

OURS _____

04 **Judgment-free steps**

There is one right answer. Anyone could give it.

OURS _____

3 · THEN GET PRACTICAL

Five questions before you hand anything off

01 **Who can see this information?**

Open to the team, or admin only. _____

02 **What happens every single week?**

Repeating work pays back first. _____

03 **What does a great result look like?**

Hand it your best past examples. _____

04 **Who reviews it before it goes out?**

A person thoroughly reads everything that leaves the building. _____

05 **What happens next, once it exists?**

Decide where it lands and who is told. _____

4 · WHAT TO DO NEXT

Start with one

01

Use what you already have

Check what Microsoft 365 or Google Workspace includes before you buy.

02

Pick the top complaint

High agreement and low politics make a good first project.

03

Keep approvals on

Nothing sends, publishes or spends until a person says yes.

04

Count hours returned

Hours returned each month is a number your board will understand.

Want help finding your first one?

Book a strategy call at **chiefof.life/book-a-call**. Thirty minutes, no deck, no obligation.

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