

AI Workflow Quick Reference Card

AI in Action: Real Workflows for Nonprofits | Wellforce IT

The prompt formula — use this every time

Role
Act as a nonprofit grant writer...
+
Task
Draft a 2-paragraph statement of need...
+
Context
Population, outcomes, geography, funder...

You are the **editor**, not the author. AI produces the draft — your judgment makes it mission-ready.

Workflow 1 Grant writing

USE FOR

- Statement of Need from program data
- Executive Summary from full narrative
- Logic model outline from program description
- Rewriting for a different funder's tone

STARTER PROMPT

```
Act as a nonprofit grant writer.
Draft a 2-paragraph Statement of Need for [Funder].
Population: [who you serve]
Key outcome: [your strongest stat]
```

Workflow 2 Donor communications

USE FOR

- Thank-you letters by giving tier
- Mid-year and year-end impact updates
- Lapsed donor re-engagement emails
- Turning outcome data into donor stories

STARTER PROMPT

```
Act as a nonprofit donor communications specialist.
Turn this program data into a 3-paragraph impact narrative. Lead
with a human moment, not a stat.
[Paste outcome data]
```

Workflow 3 Board reports & summaries

USE FOR

- 1-page board brief from long report
- Meeting notes → action item table
- Quarterly metrics narrative
- Board presentation talking points

STARTER PROMPT

```
Act as an executive director.
Summarize this into a 1-page board brief: (1) Program snapshot,
```

Workflow 4 Content & social media

USE FOR

- Full content batch from one asset
- 30-day calendar from program description
- Multi-channel event announcements
- Repurposing grant reports for social

STARTER PROMPT

```
Act as a nonprofit social media manager.
Create: LinkedIn post (150w), Facebook post (120w), Instagram
```

(2) What's working, (3) Challenges, (4) Recommended action.

[Paste report]

caption + 5 hashtags, email opener (150w).

[Paste program description]

Workflow 5 Internal operations

USE FOR

- Onboarding checklists from rough notes
- SOPs from verbal descriptions
- FAQ documents from email threads
- Staff update emails from bullet points

STARTER PROMPT

Act as a nonprofit operations manager.

Convert these notes into a phased onboarding checklist: Before First Day | First Day | First Week | Ongoing. Include a brief "why" for each step.

[Paste notes]

TIPS FOR BETTER RESULTS

Be specific — word count, tone, audience, and format all improve output

Iterate — ask it to shorten, adjust tone, or try a different angle

Paste real data — numbers and stats make drafts usable faster

Prompt library — save your best prompts in a shared doc for your team

NEVER PUT THIS IN A PUBLIC AI TOOL

- ✗ Client names, case notes, or personally identifiable information
- ✗ Donor financial data or giving history
- ✗ Patient health information (HIPAA-covered data)
- ✗ Staff HR records or salary information
- ✗ AI-generated statistics — always verify before submitting