

West Texas Rural Philanthropy Days

AI AS A STRATEGIC SIDEKICK

Using AI to reduce administrative work while
protecting trust, judgment, and mission



Permian Basin



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AI creates capacity

Strategic Sidekick

LET AI HELP WITH

- Creating first drafts
- Organizing information
- Building repeatable templates
- Summarizing approved content

KEEP PEOPLE FOCUSED ON

- Listening and coaching
- Solving problems
- Building trust
- Making accountable decisions

**The goal is better human
interactions—not fewer.**

People evaluate the person

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AI MAY HELP

- Draft clear job descriptions
- Create structured interview questions
- Draft candidate communications
- Build onboarding checklists

PEOPLE MUST

- Confirm the actual job requirements
- Consider accessibility and fairness
- Evaluate experience and context
- Make and document the decision

**An AI-generated score should never be the
final hiring decision.**

Make knowledge easier to share

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TURN APPROVED INFORMATION INTO

- Role guides
- Onboarding plans
- Training outlines
- Manager and volunteer FAQs
- Step-by-step procedures

HUMAN REVIEW CONFIRMS

- Accuracy and current policy
- Practical application
- Culture and organizational values
- Accessibility and clarity

AI can scale knowledge. People protect meaning.

Prepare—do not replace—the conversation

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AI CAN PREPARE

- Employee check-in questions
- De-identified feedback themes
- A neutral conversation outline
- A clearer, more respectful message

PEOPLE MUST

- Listen and ask follow-up questions
- Consider the full context
- Coach, investigate, and decide
- Follow through with care

AI can support the work. People build the relationships.

Good prompts set clear boundaries

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THE FOUR 'CORE' PARTS

CORE [Context, Output, Role, Execution Guardrails]

Context: Key background and approved facts

Output: What specific output is needed?

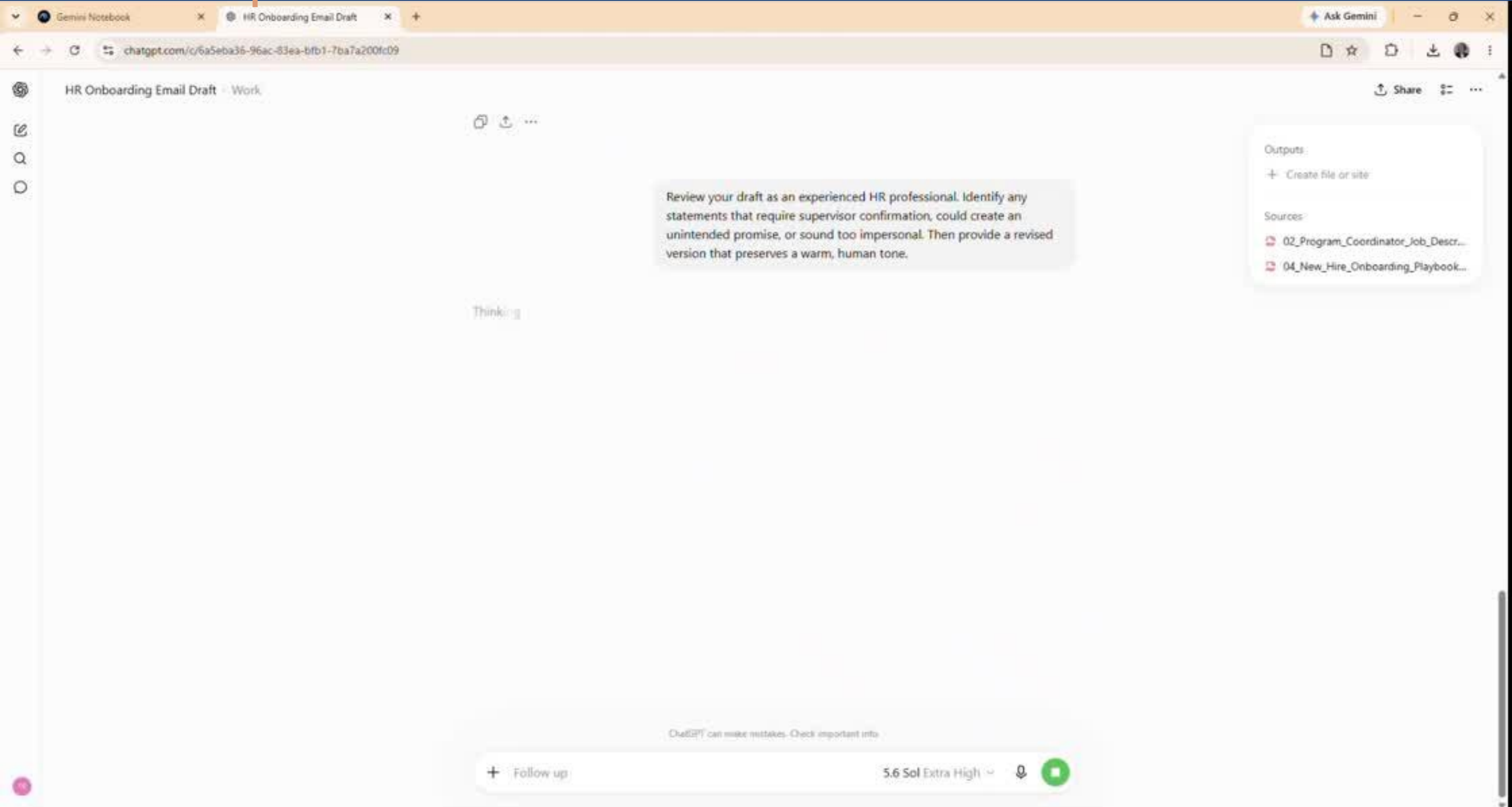
Role: Who should the AI assist?

Execution Guardrails: What must it avoid, verify, or flag?

EXAMPLE PROMPT

Act as an HR support partner for a nonprofit manager. Using only the sanitized outline below, create a one-page first-week checklist for a new program coordinator. Use a warm, practical tone. Do not invent policy requirements. Flag anything requiring HR confirmation.

From a Good Prompt to a Useful Draft



Draft, Review, Improve

HR Onboarding Email Draft - Work

Monday: Welcome and Orientation

Welcome and introductions with the supervisor and peer guide; review the first-week schedule; discuss RMCRC's mission, current priorities, and the role's connection to community outcomes; review emergency procedures, confidentiality, timekeeping, and how to ask for help; complete focused forms and approved system setup; allow time for questions and informal team connection.

Confirm the greeter, per arrangements, team intro system access.

Tuesday: Understanding the Role

Review the job description, key responsibilities, reporting relationship, and escalation expectations; begin agreeing on three first-month priorities; complete privacy and respectful-workplace training; receive an introduction to the shared program calendar; meet colleagues who regularly work with the Program Coordinator; hold the Day 2 supervisor check-in.

Confirm the training fac priority discussion, and

Wednesday: Safety, Systems, and Program Learning

Complete safety and responsible-AI training; review appropriate AI uses, required human verification, and prohibited uses involving confidential information or employee evaluation; begin learning the approved case-management system and participation-record expectations; shadow one program activity; provide time to debrief and ask questions.

Confirm training access, the systems trainer, the approved program activity, the person responsible for the shadowing experience, and any privacy requirements.

Thursday: Partners and Coordination Processes

Shadow one partner interaction; meet relevant site partners or volunteers, as appropriate; review volunteer scheduling, orientation materials, and reminder communications; learn the process for supply requests and reconciling receipts against approved program budgets; discuss questions and observations.

Confirm the partner interaction, approved participants, site location, privacy considerations, transportation expectations, and process trainers.

Friday: Communication and Next Steps

Review expectations for partner updates, meeting agendas, and monthly program summaries that require supervisor review; observe or practice an appropriate recurring task with guidance; check the status of required training; finalize three first-month priorities; hold the Day 5 supervisor check-in to discuss questions, barriers, workload, relationships, and support for the following week.

Confirm the practice task, training status, first-month priorities, supervisor check-in time, and expectations for the second week.

Outputs:
+ Create file or site

Sources:
02_Program_Coordinator_Job_Descr...
04_New_Hire_Onboarding_Playbook...

ChatGPT can make mistakes. Check important info.

+ Work on anything

5.6 Sol Extra High

Keep the human in the loop

Strategic Sidekick

1. DEFINE | 2. DRAFT

Define: A leader sets the purpose and identifies approved information.

Draft: AI creates a first version for review—not a final answer.

3. VERIFY | 4. PERSONALIZE

Verify: A qualified person checks facts, policy, fairness, and tone.

Personalize: The leader adapts, delivers, and owns the result.

Use AI for consistency; keep the personal welcome and meaningful check-ins.

Start small and low risk

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BEFORE YOU BEGIN, ASK

- Is the information public or sanitized?
- Can a person quickly verify the output?
- Is the work reversible if AI is wrong?
- Is one person clearly accountable?

GOOD STARTING POINTS

- Meeting agendas
- Generic templates
- Public-information summaries
- Checklists and communication drafts

If the work affects a person's job, pay, privacy, benefits, or safety—pause.

Different strengths, shared outcome

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AI IS USEFUL FOR

- Creating first drafts
- Formatting and comparison
- Summarizing approved content
- Generating options
- Identifying questions to consider

PEOPLE ARE ESSENTIAL FOR

- Fact-checking
- Understanding context
- Applying fairness and empathy
- Making employment decisions
- Accepting accountability

Speed matters only when quality and trust are protected.

12



One Source Set, Multiple Training Tools

Red Mesa Supervisor Onboard...
HR Onboarding Email Draft

notebooklm.google.com/notebook/52a06781-d814-4754-aa02-19f1ef2e6221?authuser=1

Ask Gemini

Red Mesa Supervisor Onboarding Playbook

Create notebook

Copy

Analytics

Share

Settings

PRO

Sources

+ Add sources

Search the web for new sources

Web Fast Research

Select all

01_Employee_Handbook_Excerpt.pdf

02_Program_Coordinator_Job_Description.pdf

03_Volunteer_Onboarding_Guide.pdf

04_New_Hire_Onboarding_Playbook.pdf

Chat

Create a professional one-page infographic for nonprofit supervisors titled "The First 30 Days: Clarity, Connection, and Confidence." Show four stages: Before Day One, Day One, Week One, and Days 8-30. Emphasize that AI supports administrative preparation while supervisors remain responsible for relationships, judgment, and employee decisions. Use a clean navy, blue, and orange HR-conference style.

I have started generating the infographic you requested. It will feature the four stages of onboarding (Before Day One, Day One, Week One, and Days 8-30) and emphasize the balance between AI administrative support and the human elements of supervision, styled in a clean navy, blue, and orange HR-conference aesthetic.

The infographic is being created in the background and will appear in your Studio tab shortly. Please note that it can take up to 10 minutes to complete. Let me know if you need anything else in the meantime!

Save to note

What questions should a supervisor ask in a 30-day review?

How can AI assist with the 'Document one process' exercise?

Detail the peer guide's specific responsibilities during onboarding.

Start typing...

4 sources

Studio

Audio Overview

Slide Deck

Video Overview

Mind Map

Reports

Flashcards

Quiz

Infographic

Data Table

Volunteer Quiz

4 sources · 1m ago

Generating Cinematic Video Overview...

This may take a while

Generating Infographic...

based on 4 sources

Add note

Gemini Notebook can be inaccurate; please double check its responses.

Pause before you prompt

Strategic Sidekick

GREEN — GO | YELLOW — PAUSE

Green: Public or sanitized information; brainstorming; generic templates; grammar and formatting.

Yellow: Internal policies, nonpublic operations, or employee communication drafts.

Yellow requires an approved tool, minimum necessary information, and qualified review.

RED — STOP

- Personally identifiable information
- Medical, payroll, or legal information
- Donor, client, or beneficiary records
- Profiling or high-stakes decisions

Do not place this information in general-purpose AI or automate the decision.

High-stakes decisions stay human

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DECISIONS THAT STAY HUMAN

- Who should be hired or rejected
- Who receives a promotion or pay increase
- Who should be disciplined or terminated
- Who qualifies for leave or an accommodation

ALSO KEEP HUMAN

- Whether a complaint is credible or who is at fault
- Whether an employee is considered a “risk”

AI may support approved administrative work.

Accountable people assess, decide, document, and communicate.

References: EEOC AI resources; DOJ ADA hiring guidance; DOL workplace AI best practices.

Policy creates confident boundaries

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EMPLOYEES SHOULD KNOW

- Which tools they may use
- What information they may enter
- Which tasks are encouraged
- Which uses are prohibited

LEADERS SHOULD DEFINE

- When approval is required
- Who reviews the output
- How to report a mistake

Clear expectations support safer experimentation and more consistent decisions.

Cover the full AI lifecycle

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FOUNDATION

- Ownership and scope
- Approved tools and authorized users
- Data privacy and confidentiality
- Permitted, restricted, and prohibited

USES

OPERATING GUARDRAILS

- Human review and fact-checking
- Bias, fairness, and accessibility
- Copyright, records, and retention
- Training and incident reporting
- Regular policy review and updates

Reference: NIST Generative AI Risk Management Profile.

Protect sensitive information

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PERSONAL INFORMATION

- Social Security numbers or dates of birth
- Banking, payroll, or benefits information
- Medical, disability, leave, or accommodation details
- Applications, résumés, or background-check results

ORGANIZATIONAL INFORMATION

- Donor, client, volunteer, or beneficiary records
- Passwords or security credentials
- Investigation or privileged legal information
- Confidential organizational strategy

When in doubt, stop and ask before submitting the information.

Report mistakes early

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1. STOP | 2. PRESERVE | 3. NOTIFY

Stop: Do not continue prompting or share the output.

Preserve: Record the tool, time, information entered, and people potentially affected.

Notify: Contact the designated HR, IT, privacy, or security representative.

4. CONTAIN | 5. LEARN

Contain: Follow instructions for deletion, access restriction, or credential changes.

Learn: Document the correction and update training or policy where needed.

Report early. Do not hide or quietly fix a potential incident.

Protect the relationship

Strategic Sidekick

CHOOSE ONE WORKFLOW

- Repetitive
- Low sensitivity
- Easy to verify
- Clearly owned by a person

THEN TEST + REVIEW

- Test the process
- Review the quality
- Measure the time reclaimed

AI is the sidekick. Human judgment, trust, and accountability remain the lead.

SHRM® Permian Basin

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for Tomorrow's Seasons

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Mary Ann Beninati
CEO & President
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Keynote Speaker



Joseph Cope
The Empathy Guy

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- EVP Across Generations

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Local Industry Leaders

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And National Vendors

Breakfast and
Lunch Provided

Register
Now



September 25, 2026 / 8am to 5pm
Bush Convention Center
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www.pbshrm.org

QUESTIONS & DISCUSSION



Trisha Rangel-Lynn
President Elect



Robert Segura
President



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**Please provide your feedback on
this session HERE**

