




**Colorado Charter Schools  
Annual Conference**  
February 25-27, 2026  
Denver Marriott Tech Center

**FORWARD  
TOGETHER**   
**2026**

*"If you want to go fast, go alone.  
If you want to go far, go together."  
— African proverb*



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# Smarter Operations: Automating Workflows with AI

**Kristen McCaw**  
**Seminar Collective Co-Founder**  
**Former Founding CFO/COO of Impact Public Schools**

**Lexi Pacheco**  
**Director of Community Inclusion**  
**Rocky Mountain Prep**

Pikes Peak  
February 27, 2026 | 11:00am  
Operations, Funding, & Facilities



“  
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conference  
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Colorado Charter Schools  
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January 27-29, 2026  
Denver, Colorado



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Colorado League of  
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We make it our priority to **advocate** for high-quality public charter schools across Colorado.



**Be a part of the action.**



# Welcome!

**Get ready to share:**

What's your current relationship with artificial intelligence?

Which AI tools or platforms are you currently using?

# Smarter Operations: Automating Workflows with AI

Colorado League of Charter Schools Conference

February 27, 2026



# Welcome & Connection



**Kristen McCaw- Facilitator**

Seminar Collective Co-Founder, Former Founding  
CFO/COO of Impact Public Schools



**Lexi Pacheco - Case Study Presenter**

Director of Community Inclusion  
Rocky Mountain Prep

# Welcome & Connection

**Stand up, pair up & share:**

**Your role, organization and location**

- What's your current relationship with artificial intelligence?
- Which AI tools or platforms are you currently using?

# Session Objectives

1

Understand how AI can streamline operations, including scheduling, compliance reporting, HR processes, and staff communication.

2

Discuss implementation strategies & get inspired to design and implement workflows that save time and reduce administrative burdens.

3

Learn to identify high-leverage automation opportunities that improve efficiency and allow staff to focus on students.



Access electronic versions of today's  
resources



EXPERT-LED WORKSHOPS



TOOLBOX

[seminar.community/  
freecharter](https://seminar.community/freecharter)

# The 3Ds

## Guiding Questions for When to Use AI

1

Could this task be faster or easier with a first draft?

2

Is this something I'd delegate if I had the capacity on my team?

3

Am I duplicating a version of something I've done before?



5

minutes

## Small Group Discussion

What's draining your time right now?  
Where might AI help?

Draft? | Delegate? | Duplicate?

# Case Study: Rocky Mountain Prep



ROCKY MOUNTAIN PREP

# Multilingual Resources



Hi Grizzly families! Please select the language you would like to listen and watch our Den Report below. Please keep in mind that these translations are generated by a platform and may contain errors. If there is an issue, please let us know! Also, though I'm not bilingual in these languages, I'm so excited that technology can help me connect with you (and I am working on learning Spanish!). -Ms. Vann

English: 🇺🇸 English

Spanish (Mexico): 🇲🇽 Spanish\_Mexico

Russian: 🇷🇺 Russian.mp4

Pashto: 🇦🇫 Pashto

Nepali: 🇳🇵 Nepali



Webcam - Screencastify - February 11, 2026 6\_5 days ago · Russian



Webcam - Screencastify - February 11, 2026 6\_5 days ago · Pashto (Afghanistan)




Webcam - Screencastify - February 11, 2026 6\_5 days ago · Nepali (Nepal)



# Gamma


The screenshot displays the Gamma application interface. On the left is a vertical sidebar with navigation icons and labels: 'G' (Gamma logo), 'Home' (house icon), 'Templates' (stack of papers icon), 'Library' (brain icon), 'Settings' (gear icon), and 'More' (three dots icon). The main content area is titled 'Templates' and includes the text 'Start with our built-in templates, or create your own to match your team's workflows'. Below this is a blue button '+ Add a gamma'. There are three filter tabs: 'Custom' (selected), 'Standard', and 'Archived'. A search bar contains the text 'Search templates'. Two template cards are visible, both featuring a photo of a group of children sitting on steps. The first card has a white background and the text 'Connecting BRAVE to Family Empowerment: Resisting Deficit Mindsets' and 'Growth & Operations | November 6, 2025'. The second card has a dark blue background with the same text in yellow. Both cards have a 'BRAVE Training' label below them and a three-dot menu icon to the right.

# Custom GPTs

 **Izzy**  
• Live • Anyone with a link

Last edited Feb 20 Updates pending Share Update

Create Configure



**Name**  
Izzy

**Description**  
Supportive AI for culture, community engagement, DEIB, multilingual access, HRD theory, and graduate


**Instructions**  
Izzy now supports Lexi in drafting weekly executive summaries for Indrina using a concise, high-level format. These summaries are aligned with the RMP Leadership Competencies, which are now part of Izzy's knowledge base and used as central resources for:  
- Executive communication  
- Project planning and strategy  
- Challenge troubleshooting and risk mitigation

Conversations with your GPT can potentially include part or all of the instructions provided.

**Conversation starters**

- Draft this week's executive summary for Indrina
- Help me align my update to the RMP competencies
- Turn this into a BRAVE-aligned project reflection
- What strengths should I highlight in this summary?

**Preview** Model 5.2




  
**Izzy**  
Supportive AI for culture, community engagement, DEIB, multilingual access, HRD theory, and graduate study success.

Draft this week's executive summary for Indrina

Help me align my update to the RMP competencies

Turn this into a BRAVE-aligned project reflection

What strengths should I highlight in this summary?

+ Ask anything   

# Strategies & Inspiration

# Criteria for Automation

Identify automation opportunities

Avoid over-automation



## Criteria for Automation

The following may make a process or task more suitable for automation.

	<b>Documented and effective.</b> Processes that are written out and getting the intended outcomes are good candidates for automation. Automation won't fix a broken process!
	<b>Repetitive.</b> Processes that are repetitive and occur frequently are good candidates for automation, such as data entry, scheduling, and report generation that require little variation.
	<b>High volume.</b> Tasks that involve handling large volumes of data or transactions are good candidates for automation. Automating these tasks can reduce the likelihood of errors and improve consistency.
	<b>Time-consuming.</b> Processes that are time-consuming and resource-intensive can be good candidates for automation.
	<b>Rule-based.</b> Processes that involve rule-based decision-making and follow predictable patterns can be automated. Automated systems can apply predefined rules consistently and efficiently without human intervention.

The following may make a process or task less suitable for automation.

	<b>Complex decision-making.</b> Processes that require complex decision-making or judgment based on nuanced factors may not be suitable for automation.
	<b>Highly variable.</b> Tasks that involve a high degree of variability or unpredictability may not be well-suited for automation.
	<b>Sensitive or confidential information.</b> Processes that involve handling sensitive or confidential information may not be appropriate for automation due to security concerns. Automated systems may increase the risk of data breaches or unauthorized access if not properly secured.
	<b>Customer-facing interactions.</b> Processes that involve direct interactions with students, staff, families, and community members that require personalized or empathetic communication may not be appropriate for automation. Also consider whether the process is an important opportunity to build rapport or understand individual circumstances; these may make something a poor fit for automation.
	<b>Creative or innovative.</b> Tasks that require creativity, innovation, or out-of-the-box thinking are less likely to be effectively automated.

# Automation Planning Tool

Clarify purpose

Identify criteria

Identify people & their  
roles



## Automation Planning Tool

<b>Purpose:</b> What specific problem or challenge is this system intended to address?	
<b>Users:</b> Who will the primary users of the system be, and what are their needs?	
<b>Timeframe:</b> Are there deadlines that affect the development and/or implementation of this system? For what time horizon are you developing the system (e.g. something that will work for the next 12 months, or something that will work for the next 4 years)?	
<b>Scale:</b> Based on your timeframe, what future growth or other organizational plans does your system need to be able to accommodate?	
<b>Integration:</b> Does the new system need to integrate with existing systems and processes? If this is a long-term solution, what future integrations might be necessary?	
<b>Budget:</b> What is the budget available for this system? Will creating this system result in cost savings? Might you leverage those future cost savings to cover any upfront investment costs?	
<b>Flexibility:</b> Is this the type of system where you can provide a lot of flexibility to users (loose), or one where you need people to do things in a very specific way (tight)?	
<b>Engagement:</b> Who else needs to approve your design? Who needs to be engaged in the design process? Who needs to be informed of your final design?	
<b>Oversight:</b> What aspects of the system design require leadership oversight, and what can be delegated?	

# Automation Inventory

Identify current state

Identify opportunities to take it to the next level

Automation won't fix a weak system

Automation Inventory					
Functional Area for Operations	We have an effective system in place.	Our effective system is partially documented.	Our effective system is thoroughly documented.	Our effective system leverages technology (including AI and automations) to be more efficient and reduce rote, manual tasks.	Our effective system maximizes technology (including AI and automations) to be as efficient as possible and eliminate rote, manual tasks.
Attendance					
Arrival & Dismissal					
Assessments					
Board					
Calendar					
Communications					
Enrollment					
Facilities					
Field Trips					
Front Desk Management					
Health & Safety					
Janitorial & Landscaping					

# Inspiration Bank

Clarify purpose

Identify criteria

Identify people & their roles




## AI & Automation Inspiration Bank

Area	Function	Idea	Potential Tools	Level
Attendance	Contacting families	AI agent drafts multilingual outreach and logs to SIS	Lovable, Claude Code, Zapier	Level 1
Attendance	Trend monitoring	Early warning dashboard with intervention suggestions	Power BI, Tableau, Retool	Level 1
Arrival and Dismissal	Staff out adjustments	Staffing reallocation tool	Lovable, Retool, Deputy	Level 2
Arrival and Dismissal	Correct guardian release	Dynamic dismissal verification synced to SIS	SchoolPass, PikMyKid, Lovable	Level 3
Assessments	Designing	Internal aligned assessment	Playlab, MagicSchool, QuestionWell	Level 1

**Apply It!**






**Choose one operations challenge you want to improve this year with AI. Use the Automation Planning Tool to begin to plan your next steps.**

### Automation Planning Tool

<b>Purpose:</b> What specific problem or challenge is this system intended to address?	
<b>Users:</b> Who will the primary users of the system be, and what are their needs?	
<b>Timeframe:</b> Are there deadlines that affect the development and/or implementation of this system? For what time horizon are you developing the system (e.g. something that will work for the next 12 months, or something that will work for the next 4 years)?	
<b>Scale:</b> Based on your timeframe, what future growth or other organizational plans does your system need to be able to accommodate?	
<b>Integration:</b> Does the new system need to integrate with existing systems and processes? If this is a long-term solution, what future integrations might be necessary?	



# Discussion & Reflection

- **Small Groups:**

- How is your team already leveraging AI & automation to increase effectiveness?
- Where is an opportunity for you to use AI & automation to increase effectiveness?
- What are your next steps?



2  
minutes

- **Whole Group:**

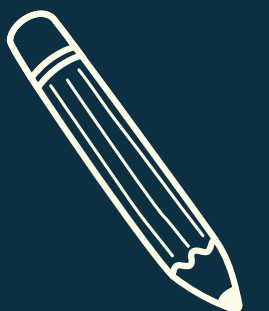
- Where is an opportunity for you to use AI & automation to increase effectiveness for your organization?



2  
minutes

- **Reflection:**

- Jot down your next steps



1

minute



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EXPERT-LED WORKSHOPS



TOOLBOX

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Thank  
*you*



**“  
Your  
feedback  
helps us all  
move forward  
together**



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Each time you take the survey you can enter to win prizes