Luis Portalatin-Gauthier

When Your Spreadsheets Start Feeling Like Barriers to Justice

What if your technology actually amplified your mission instead of draining your energy?

Picture this: It's Friday afternoon. Your program director just texted that she can't make Monday's funder meeting because she's still struggling to track down impact data scattered across three different systems. Your development director is manually cross-referencing donor and organizing databases—again. And somewhere in your Google Drive labyrinth lies the perfect community testimony from last year's campaign that would be perfect for your upcoming board presentation... if only anyone could find it.

Meanwhile, your finance team is drowning in budget revisions while program staff avoid financial conversations altogether because, let's be honest, QuickBooks wasn't designed with movement organizers in mind.

What if it didn't have to be this way?

What if your technology could actually understand both your mission and your day-to-day reality? What if it could help translate between program visions and financial constraints, preserve your community's hard-won knowledge across staff transitions, and free your people to focus on what truly matters: building relationships, developing strategy, and creating change?

That's exactly what I've been building for the past 17 years—not as a tech guru, but as someone deeply embedded in movement work who understands that our technical challenges are actually political ones.

Where I'm Coming From

My journey hasn't followed the typical tech consultant path. I've worked inside social justice organizations at every level—from grassroots collectives juggling C3, C4, and PAC structures to philanthropic intermediaries managing complex grant-making programs and cohort models.

I've been the finance person trying to make QuickBooks speak movement language, the operations director wrestling with disconnected systems, and the development support translating community wisdom into funder metrics. I've experienced firsthand how our technical systems often concentrate knowledge in ways that contradict our values of distributed power and collective wisdom.

What makes my approach different is this lived experience at the intersection of movement work and operational systems:

- **Deep financial expertise:** I've designed budget systems that actually make sense to program staff, consolidated accounting for fiscally sponsored projects, and created scenario planning tools that illuminate choices rather than obscuring them

- **Operational systems knowledge:** I've implemented online portals for tracking grant awards, developed standardized operating procedures that institutionalize collective wisdom, and built dashboards that make complex information accessible to everyone

- **Cohort and grant management experience:** I've designed collaborative learning spaces for grantee cohorts, managed complex reporting systems that honor community knowledge, and built evaluation frameworks that measure what actually matters

Most importantly, I understand the political dimensions of our technical challenges—how information flows (or doesn't) between teams, which voices get centered in system design, and whether our tools reflect our theories of change.

When I saw how emerging AI technologies could transform these dynamics, I developed an approach that centers movement values rather than corporate efficiency:

- **Movement ownership:** Your data stays under your control, never feeding corporate surveillance systems

- **Liberatory design:** Technologies that distribute rather than concentrate power within your organization

- **Relationship-centered tools:** Systems that enhance human connections rather than replacing them

- **Financial accessibility:** Sliding-scale pricing that ensures these tools are available to organizations of all sizes

How We Might Work Together

AI Readiness & Systems Assessment
Starting at $1,500 for grassroots organizations

Every organization I work with begins here – not with technical specifications, but with deep conversations about your theory of change and how your current systems help or hinder your vision. Through collaborative sessions with your team, I help you understand:

- Where information gets trapped in silos, creating bottlenecks and burnout
- How your current tools might distribute or concentrate power within your organization
- What specific AI integrations would meaningfully advance your mission
- How to ensure any technology you adopt embodies your values

You'll receive a detailed roadmap with concrete recommendations, followed by a 60-day check-in to support your initial steps. Most importantly, you'll gain clarity on which technological interventions actually serve your movement goals.

AI Co-Pilot Implementation
Sliding scale for grassroots organizations

Imagine your team having intelligent assistants that understand both your mission and your systems. These co-pilots don't replace human judgment—they amplify your team's wisdom by handling routine tasks while surfacing insights that might otherwise remain hidden.

Financial Intelligence Co-Pilots
Does this sound familiar? It's budget season, and your program directors avoid financial conversations because spreadsheets seem disconnected from their daily work. Meanwhile, your finance team members are overwhelmed trying to translate program visions into numbers without the right systems to support their expertise and extend their impact.

A Financial Intelligence Co-Pilot transforms this dynamic by:

- Translating between program language and financial terms so everyone can participate in budget discussions
- Creating visual scenario models that show how funding changes would affect different aspects of your work

- Democratizing financial knowledge beyond the "money person," reducing bottlenecks and vulnerability
- Freeing your finance team to focus on strategic thinking instead of endless spreadsheet maintenance

Knowledge Management Assistants

How much institutional wisdom becomes inaccessible when team structures evolve? How many hours do staff spend hunting for information scattered across emails, drives, and chat channels?

A Knowledge Management Assistant builds collective memory by:

- Connecting related documents and conversations across platforms to create accessible organizational history
- Allowing staff to ask questions in plain language and receive context from across your systems
- Preserving community relationships and campaign strategies across staff transitions
- Accelerating onboarding for new team members without burdening existing staff

Impact Storytelling Engines

You're drowning in data but starving for insight. You collect information across different systems but struggle to transform it into meaningful stories about your impact.

An Impact Storytelling Engine bridges this gap by:

- Identifying patterns across programs that might otherwise remain invisible
- Connecting quantitative metrics with qualitative outcomes and community narratives
- Generating audience-specific stories for different stakeholders, from funders to community members
- Surfacing unexpected ripple effects and connections across your work

Donor Engagement Co-Pilots

Your development director uses a donor database while your organizers use separate systems for community engagement. The result? Fundraising that feels disconnected from your movement work.

A Donor Engagement Co-Pilot transforms this approach by:

- Identifying supporters whose interests align with current campaigns
- Suggesting personalized engagement pathways based on people's relationship with your work
- Connecting fundraising data to program outcomes to show real-world impact
- Empowering program staff to participate in relationship-centered development

These co-pilots integrate with tools you already use—like QuickBooks, Google Workspace, Airtable, Slack, and CRM systems—so there's no massive new system to learn or maintain. Most importantly, they preserve the human heart of your work while transforming administrative processes to redirect your team's energy toward mission-critical work.

Strategic AI Roadmapping

Sliding scale based on organizational complexity

For organizations ready for comprehensive transformation, I develop multi-year strategies that align technology with your theory of change. This includes:

• Vision alignment workshops with leadership, staff, and community members
• Ethical assessment of current and potential technology systems
• Phased implementation planning with clear milestones
• Funding strategy development for sustainable technology initiatives
• Community governance frameworks to ensure technology remains accountable

Movement-Aligned AI Training

Starting at $2,500 for small teams

Technology should never create new hierarchies within your organization. I offer customized training that builds your team's capacity to work effectively with AI tools while maintaining alignment with your values:

• Hands-on workshops tailored to different roles, from organizers to operations staff
• Ethical frameworks for making decisions about AI in social justice contexts
• Development of internal governance protocols that keep technology accountable to community

AI Systems Maintenance & Evolution

Starting at $1,200/month for small organizations

Your movement's work evolves constantly, and your technology should evolve with it. My ongoing support ensures your AI systems grow alongside your organization:

• Monthly refinement based on changing needs and emerging opportunities
• New use case development as your work expands
• Strategic guidance on emerging capabilities relevant to your mission

For Funders and Fiscal Sponsors

If you support multiple organizations, I offer specialized services to amplify your impact:

- **Cohort Implementation Models:** Create shared technology resources across your grantee network, allowing smaller organizations to access sophisticated tools while learning from each other

- **Capacity Building Programs:** Develop customized AI training curricula that build long-term technological self-determination for your grantees

- **Data Sovereignty Infrastructure:** Establish movement-controlled alternatives to corporate technology platforms that protect sensitive organizing information

- **Technology Justice Assessments:** Evaluate how technology investments can address power imbalances within your grantee ecosystem

My Commitment to Accessibility

I believe these tools should be available to all organizations working for justice:

- **Movement Discount:** Organizations led by and serving Black, Indigenous, and communities of color qualify for a 15% discount on all services

- **Fiscal Sponsorship Partnerships:** I partner with fiscal sponsors to create accessible pathways for grassroots groups

- **Capacity Building Support:** I can provide boiler plate templates to help you fundraise and support your project.

- **Collective Pricing:** Similar organizations can form implementation cohorts to share costs while learning from each other

Let's Explore What's Possible Together

I'd love to schedule a free 30-minute conversation to explore how these approaches might serve your mission. You'll walk away with at least one concrete idea you can implement, whether we work together or not.

In solidarity,

Luis Portalatin-Gauthier

"We stand at a pivotal moment where AI could either reinforce existing power structures or help create more just alternatives. I'm committed to ensuring social justice organizations have access to these powerful tools in ways that amplify their mission rather than extracting their knowledge."