

AI Strategy for Nonprofits: Board-Ready AI Roadmap

Use this phased framework for assessing readiness, setting governance, piloting, and scaling AI — built for board alignment and executive accountability.

	PHASE 01 Assess AI Readiness	PHASE 02 Prioritize Use Cases	PHASE 03 Set Governance & Ethics	PHASE 04 Pilot & Measure	PHASE 05 Scale What Works
OBJECTIVE	Establish a baseline across data quality, technology, staff capacity, and leadership alignment.	Rank AI opportunities by impact, feasibility, and risk to determine where to start.	Establish policy, oversight structure, and accountability standards.	Test one use case in a scoped, time-bound pilot with pre-defined goals.	Expand proven capability org-wide with training, documentation, and a review loop.
KEY ACTIVITIES	Assess data, tech stack, staff capacity, and board alignment. Identify gaps with named owners.	Map and score use cases against impact, feasibility, and risk. Assign an owner to each shortlisted case.	Draft AI governance policy covering data privacy, human oversight, and vendor accountability.	Run a 60–90 day pilot. Collect data and make a clear continue / adjust / stop decision at close.	Train staff, build process guides, establish internal champions. Update AI policy as tools evolve.
OWNER	ED / COO / Ops Lead	Department Leads	ED + Legal / Compliance	Named Pilot Lead	Ops Lead + IT
TIMELINE	Weeks 1–3	Weeks 4–6	Weeks 6–8	Months 2–4	Months 4+
SUCCESS METRIC	Readiness scorecard and gap list with owners	Ranked shortlist of 3–5 use cases with named owners	Written AI governance policy approved at leadership level	Continue / adjust / stop decision backed by evidence	Adoption rate, time saved, and mission outcome improvement
GOVERNANCE CHECKPOINT	Leadership sign-off on findings and gap list	Leadership approval of prioritized use case list	Board review and formal approval of AI governance policy	Regular progress reporting to leadership throughout pilot period	Continuous review cycle; board receives annual AI use report

Ready to put this into action? **MomentiveIQ** automates the workflows on this roadmap, surfaces predictive insights, and keeps every action governed and auditable — built for nonprofits and associations on 40-plus years of sector knowledge.

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