

# AI FOR NONPROFITS: SELF-ASSESSMENT WORKSHEET

**Is your organization ready to use AI tools?**

Complete this quick checklist to assess your current strengths and identify opportunities for introducing AI into your nonprofit operations.

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## **SECTION 1: ORGANIZATIONAL READINESS**

**1. How would you describe your nonprofit's use of digital tools?**

- ☐ We still use mostly paper and spreadsheets.
- ☐ We use basic tools like Google Docs, email, and social media.
- ☐ We use digital tools for CRM, project management, or impact tracking.
- ☐ We are already testing automation or analytics tools.

**2. Does your team have access to clean, organized data (donors, clients, programs)?**

- ☐ Not really — it's scattered or outdated.
- ☐ Somewhat — we collect data but it's inconsistent.
- ☐ Yes — we maintain structured data in specific tools or databases.

**3. How comfortable is your staff with trying new tech?**

- ☐ Very hesitant or overwhelmed.
  - ☐ Open but needs clear training.
  - ☐ Comfortable — we've adopted new tech before.
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## SECTION 2: USE CASE IDENTIFICATION

**4. Where does your team lose the most time?** *(Check all that apply)*

- ☐ Writing emails, grant drafts, or reports
- ☐ Repeating the same answers to the public
- ☐ Analyzing data for reports
- ☐ Managing and segmenting donor lists
- ☐ Planning outreach or advocacy campaigns

**5. Which of these goals is most important in the next 6 months?**

- ☐ Improve fundraising or donor retention
- ☐ Increase community engagement
- ☐ Improve internal efficiency
- ☐ Measure program outcomes better
- ☐ Expand services without hiring more staff

**6. Have you tried using ChatGPT or another AI tool before?**

- ☐ No, never
  - ☐ Yes, but not for work
  - ☐ Yes, and we've tested it for nonprofit tasks
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## SECTION 3: ETHICAL AND OPERATIONAL READINESS

**7. Are you clear on how your data is stored and who has access?**

- ☐ Not sure
- ☐ Mostly — we use some data management tools
- ☐ Yes — we follow data privacy and security policies

**8. Do you have guidelines or values about tech and equity?**

- ☐ No, but we want to
  - ☐ Yes, but they need updating
  - ☐ Yes, and they actively guide our tech use
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## HOW TO INTERPRET YOUR RESULTS

Count how many checks you made in each of the following tiers:

### Readiness Tier

### Interpretation

6–8 “Top-tier”  
Answers

✓ You’re ready to pilot AI tools. Focus on communications, fundraising, or evaluation.

3–5 “Top-tier”  
Answers

⚠ You’re in an ideal position to begin exploring low-risk, practical AI tools.

0–2 “Top-tier”  
Answers

🔧 Focus on building digital readiness first—then gradually introduce AI capabilities.

*“Top-tier” answers are the ones that reflect preparedness, structure, or openness to experimentation (e.g., clean data, digital tools in place, etc.)*

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## NEXT STEPS

- ☐ Review the *AI Tools for Nonprofits* list
  - ☐ Identify one process where AI might save time
  - ☐ Discuss findings with your team at your next strategy meeting
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**Organization:** AI for Altruism

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*This worksheet is part of A4A’s growing AI Readiness Toolkit for nonprofits.*