

AI Ready for 2026

A practical checklist for nonprofit leaders and fund development teams.

This is not about chasing tools or trends. It is about building the skills, habits, and workflows your organization will need over the next 12 to 24 months.

Use this checklist as a short self assessment or a 15 minute team conversation.

1. Leadership and Strategy

- ☐ We have discussed how AI supports our mission and values, not just efficiency
 - ☐ Leadership agrees AI is a productivity tool, not a replacement for people
 - ☐ We have identified 2 to 3 priority areas where AI could reduce administrative load
 - ☐ We are clear on what success looks like when AI is used well in our organization
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2. Prompting and Communication Skills

- ☐ Staff understand that good AI results depend on clear instructions
 - ☐ We can clearly describe tasks, context, constraints, and desired outcomes
 - ☐ We reuse prompts instead of starting from scratch each time
 - ☐ AI outputs are reviewed and refined, not blindly accepted
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3. Tool Fluency (Without Tool Overload)

- ☐ We use a small, consistent set of AI tools rather than many disconnected ones
- ☐ Staff know when to use AI and when not to
- ☐ We have at least 3 to 5 repeatable use cases where AI saves time every week
- ☐ AI is integrated into existing workflows rather than added as extra work

4. Automation and AI Agents

- ☐ We understand the difference between chat based AI and automated workflows
- ☐ At least one routine process has been identified for standardization or automation
- ☐ We have clear guardrails for what AI can and cannot do
- ☐ Human oversight is built into any automated process

5. Data, Privacy, and Responsible Use

- ☐ We know what data should never be entered into public AI tools
- ☐ Staff understand basic data privacy and confidentiality risks
- ☐ We evaluate AI outputs for accuracy, bias, and relevance
- ☐ Ethical use of AI has been discussed openly with staff

6. Human Skills That Matter More in 2026

- ☐ AI is being used to reduce admin work, not relationship time
- ☐ Staff have more capacity for donor conversations, storytelling, and stewardship
- ☐ Critical thinking and judgment are emphasized over speed alone
- ☐ AI supports collaboration rather than replacing it

7. Learning and Continuous Improvement

- ☐ We have a shared language for talking about AI across the organization
- ☐ Staff are encouraged to experiment in low risk ways
- ☐ We regularly review what is working and what is not

☐ AI learning is treated as an ongoing skill, not a one time training

Reflection

If you checked most of these boxes, your organization is on the right path.

If several areas feel unclear or unfinished, that is normal. Most organizations are still early in this work.

The goal is not perfection. The goal is progress, confidence, and intentional use of AI that strengthens people, relationships, and mission impact.

If you would like support walking through this checklist with your leadership team or fund development staff, AI productivity coaching and facilitated sessions are available through TR Leadership.