

AI Readiness Assessment

for Nonprofit Fundraising Teams

Score your organization across 5 dimensions to determine where AI will create the most immediate impact on your fundraising operation.

1. Data Infrastructure

How clean, centralized, and accessible is your donor data?

Description	Score
CRM contains 90%+ of donor interactions, gifts logged within 24hrs, custom fields populated	5
CRM has most data but some lives in spreadsheets or staff inboxes	3
Data scattered across multiple systems, significant gaps, inconsistent entry	1

Your score for this dimension: _____ / 5

2. Process Documentation

Are your fundraising workflows written down or tribal knowledge?

Description	Score
Campaign playbooks exist for annual fund, major gifts, events. SOPs for gift processing, acknowledgments	5
Some processes documented, but key workflows live in people's heads	3
Little to no documentation. If a key person left, the process would break	1

Your score for this dimension: _____ / 5

3. Team Technical Capacity

Can your team adopt and sustain new technology?

Description	Score
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Team regularly uses CRM reporting, comfortable with new tools, someone owns tech adoption	5
Basic CRM usage. Team uses email and spreadsheets but resists new platforms	3
Minimal tech adoption. Staff manually processes most tasks. High change resistance	1

Your score for this dimension: _____ / 5

4. Leadership Buy-In

Does organizational leadership understand and support AI investment?

Description	Score
ED/CEO champions technology. Board supports innovation budget. AI is in the strategic plan	5
Leadership is open but hasn't committed resources. AI is discussed but not prioritized	3
Leadership is skeptical or opposed. Technology seen as cost, not investment	1

Your score for this dimension: _____ / 5

5. Revenue Complexity

Does your fundraising operation have enough scale and complexity to benefit from AI?

Description	Score
\$3M+ annual fundraising. Multiple revenue streams. 5,000+ donor file. Major gift pipeline	5
\$1-3M annual. 2-3 revenue streams. Growing donor file. Some major gifts	3
Under \$1M. Primarily events or grants. Small donor file. Limited diversification	1

Your score for this dimension: _____ / 5

Scoring Guide

21-25: AI-Ready

Your organization has the foundation for immediate AI deployment. Start with predictive donor scoring and automated segmentation. You'll see ROI within 60 days.

14-20: AI-Adjacent

Strong foundation with gaps to close. Focus on data cleanup and process documentation first. You're 30-60 days of preparation away from productive AI deployment.

8-13: AI-Curious

Significant groundwork needed before AI creates value. Prioritize CRM hygiene, basic automation, and leadership alignment. AI is a 6-12 month goal, not a next-week project.

5-7: Foundation First

AI isn't the priority right now. Focus on fundraising fundamentals: CRM adoption, donor stewardship basics, and revenue diversification. Build the operation, then add intelligence.

Your total score: _____ / 25
Your AI readiness tier: _____

Get your personalized AI deployment roadmap

lfgandme.com/gtg