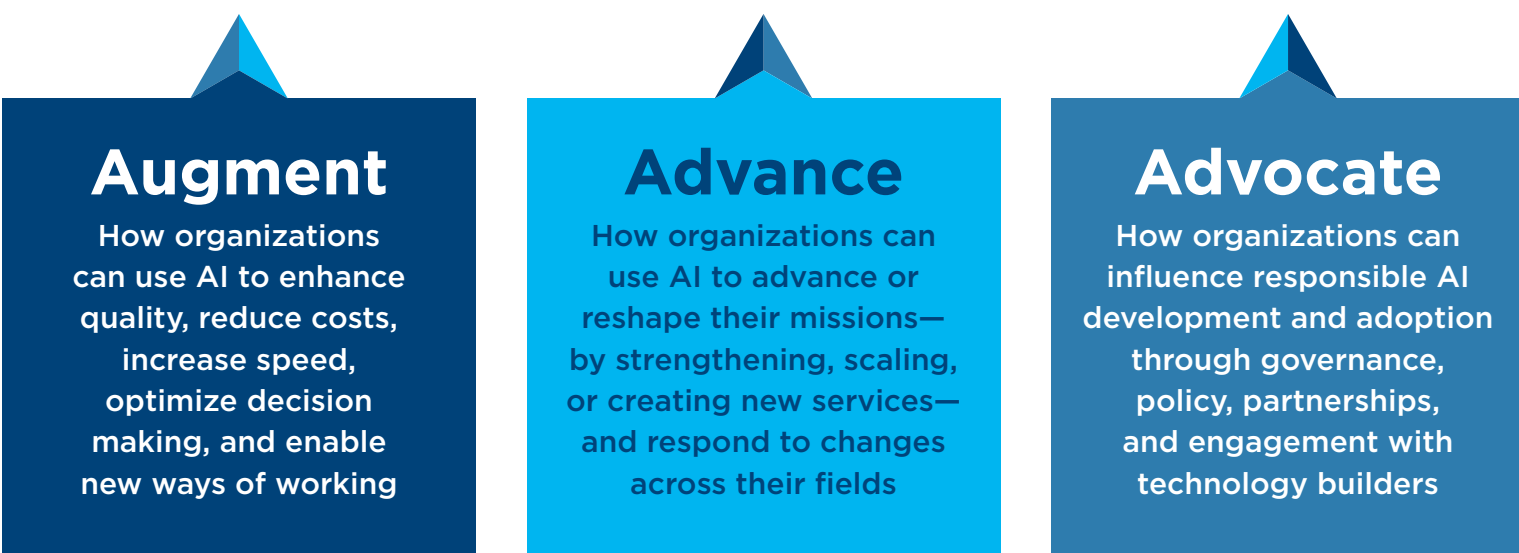


CHOOSING YOUR AI PATH: APPLYING THE FRAMEWORK FOR NONPROFITS

August 2026

A framework to move from AI uncertainty to action

Artificial intelligence (AI) is rapidly reshaping the social sector. It’s changing how work gets done, how decisions are made, how resources are allocated, and ultimately who benefits. In “Choosing Your AI Path: A Framework for Nonprofit Leaders to Make Strategic Choices,” we introduce a framework organized around three dimensions of how a nonprofit might adapt:



Equity considerations are present in all three dimensions, from mitigating bias to promoting equitable outcomes for communities served to ensuring AI’s evolution benefits the public interest.

We designed this set of worksheets to help nonprofit leaders apply the framework in a practical way: clarifying where AI matters most (and where it doesn’t), what choices are needed, and what actions to take next. Organizations do not need to prioritize all three dimensions equally. The goal is to determine where AI is most relevant, where the opportunities and risks are greatest, and where your organization is ready to act.

The three dimensions draw on perspectives we heard from social sector leaders across the world. Starting points will vary: some organizations focus on nonprofit readiness and risk mitigation, while others focus on national development priorities, population-level service delivery, or cross-sector collaboration. As you use the framework, consider both your organization’s role and the broader ecosystem. Equity considerations should also reflect regional context, including affordability, access, language, and data sovereignty.

Who should use these worksheets

- Nonprofit leaders can use these worksheets to ground the choices they make about AI in their missions, strategies, operations, and risk tolerances. To fill out the worksheets, leaders should seek input from operations, technology, and data leaders; program leaders; board members; frontline staff; and community members.
- Organizations will come to the worksheets from different starting points, but the core task is the same: understand where AI matters most, make choices, and revisit them as conditions change. A separate board worksheet helps boards clarify their oversight role and identify the AI-related issues that warrant board attention.
- Institutional funders may also find this framework helpful to understand the choices facing nonprofits and to identify opportunities to support capacity, infrastructure, learning, and responsible experimentation. Because funders rarely have enough context to determine a nonprofit’s AI priorities, we do not recommend that funders use the worksheets to prescribe a grantee’s strategy.
- We’ve included examples throughout, which are illustrative only.

Core challenge to navigate	Your organization faces pressure to adopt AI quickly, without time, resources, clear guidance, or examples.
Your organization faces pressure to adopt AI quickly, without time, resources, clear guidance, or examples. What this feels like in practice	Nonprofit leaders may feel caught between pressure to move quickly and internal resistance. That tension can reflect real concerns about equity, trust, and mission fit. It can also leave organizations feeling overwhelmed, isolated, or unsure where to start.
How this framework helps	Provides a way to assess how AI may reshape operations, mission and program delivery, and where organizations could engage to shape responsible stewardship of this powerful tool.
Who helps put the framework into practice	• Executive leaders who can set the overall AI strategy and guardrails • Operations, technology, and data leaders who can identify readiness needs and internal use cases • Program leaders who can assess implications for mission delivery • Frontline staff and community members who can help test whether AI use is practical, equitable, and trustworthy

Where to start

At the core of the framework is one practical question: Which dimension (or dimensions) is most important for your organization to prioritize? Here are a few ways to approach the question before sitting down with the worksheets.

	DIMENSION 1: AUGMENT	DIMENSION 2: ADVANCE	DIMENSION 3: ADVOCATE
This may be the right primary focus if...	Your organization is early in its AI journey, teams are already experimenting with AI informally, or staff capacity is tied up in repetitive tasks.	Your organization has a proven delivery model, major unmet demand, strong data or field expertise, or a real opportunity to redesign how it delivers programs or services.	Your organization has the credibility, experience, evidence, or influence to shape how AI affects your field or communities.
Questions to start with...	How might AI improve internal capacity, workflows, or staff effectiveness?	How might AI help improve outcomes, reach more people, or enable the creation of new programs or services?	How might your organization influence how AI affects its field, community, or broader systems?
Actions might include...	• A clear way of identifying, defining, and prioritizing use cases • A basic responsible use policy or staff guidance • Clear rules for sensitive data, personally identifiable information, and human review • Rapid prototyping of tools to streamline administrative tasks • A process to track efficiency gains or return on investment • A way to collect staff feedback and identify risks as use expands	• A clear problem statement and criteria for deciding whether AI is the right solution • Ways to collect meaningful community and staff input on the needs of and risks to the community, and what it would take for them to trust AI tools • A plan for human judgment, consent, privacy, data protection, feedback mechanisms, and escalation in high-stakes contexts • A path from pilot to sustained operations, including funding, staffing, evaluation, and ownership	• Clarity on whether the organization is staying aware or actively building evidence and advocating • A mandate that connects this work to mission and community needs and priorities • Trusted relationships with communities, peers, policymakers, funders, or technology builders • An advisory board, potentially, to review the organization’s positions, with a mix of community constituents, board members, and other stakeholders • Capacity to participate without distracting from higher-priority mission work
Spend most of your time here if...	The near-term priorities are readiness, guardrails, workflow redesign, and responsible experimentation.	AI may require revisiting your theory of change, program model, services, or pathways to scale.	The biggest opportunity or risk sits beyond your organization’s own use of AI, such as policy, standards, field norms, or community protection.

How to apply this framework

These four steps can help you understand where AI is affecting your organization and field and turn that into a focused set of actions.

- 1** Take inventory of AI's effects on your operations, programs, workforce, or field
- 2** Identify a primary dimension (or dimensions) to focus on in the near term
- 3** Prioritize a small set of actions that can meaningfully and responsibly advance your goals
- 4** Invest in learning and experimentation alongside implementation

 DIMENSION 1: AUGMENT

Worksheet 1A: Take inventory of AI’s effect on your operations and workforce

STEP 1 – TAKE INVENTORY

1A Instructions: Fill out the table below to identify where AI is already affecting and may begin to affect your organization’s internal operations and workforce. Consider current uses, emerging opportunities, potential risks, and community perceptions. In practice, the three dimensions overlap, and some effects may span more than one dimension. See the supplement for potential risks and safeguards to consider.

Equity should be considered across each question. As you take inventory, consider who benefits, who may be excluded or harmed, whose perspectives are represented, and how AI may affect different communities or groups in different ways.

DIMENSION	HOW IS AI SHOWING UP IN YOUR ORGANIZATION?	WHERE DO YOU SEE OPPORTUNITIES EMERGING?	WHAT RISKS ARE YOU CONCERNED ABOUT?	HOW MIGHT THE COMMUNITIES YOU SERVE PERCEIVE OR EXPERIENCE YOUR ORGANIZATION’S USE OF AI?
Illustrative example	Staff are using generative AI informally to draft emails, funding proposals, and internal materials.	Reducing time spent on repetitive administrative work could allow staff to devote more time to clients and programs.	Staff may enter confidential information into tools that have not been approved, creating privacy and security risks.	Constituents are concerned that AI is being used without oversight, particularly when it shapes communications they receive.

 DIMENSION 2: ADVANCE

Worksheet 1B: Take inventory of AI’s effect on your programs and communities

STEP 1 – TAKE INVENTORY

1B Instructions: Fill out the table below to identify where AI is already affecting and may begin to affect your organization’s programs and the communities you serve. Consider current uses or responses, emerging opportunities, potential risks, and community perceptions. In practice, the three dimensions overlap, and some effects may span more than one dimension. See the supplement for potential risks and safeguards.

Equity should be considered across each question. As you take inventory, consider who benefits, who may be excluded or harmed, whose perspectives are represented, and how AI may affect different communities or groups in different ways.

DIMENSION	HOW IS AI SHOWING UP IN YOUR ORGANIZATION?	WHERE DO YOU SEE OPPORTUNITIES EMERGING?	WHAT RISKS ARE YOU CONCERNED ABOUT?	HOW MIGHT THE COMMUNITIES YOU SERVE PERCEIVE OR EXPERIENCE HOW YOUR ORGANIZATION USES OR RESPONDS TO AI?
Illustrative example	We are piloting an AI-enabled tool that helps job seekers identify relevant job openings and tailor their applications.	AI could help provide more personalized, timely support to job seekers outside regular business hours.	The tool may suggest lower-paying jobs to individuals based on their backgrounds (thereby exacerbating job segregation). A data breach could expose sensitive personal information.	Job seekers value faster, more personalized help but worry that AI is giving inaccurate advice or raising barriers to applying for jobs. People with limited digital access or confidence face additional barriers.

 DIMENSION 3: ADVOCATE

Worksheet 1C: Take inventory of where it will be important to influence how AI is used and governed

STEP 1 – TAKE INVENTORY

1C Instructions: Fill out the table below to identify where your organization may seek to influence how AI is used or governed. Consider current ways of influencing, emerging opportunities, potential risks, and community perceptions. In practice, the three dimensions overlap and some effects may span more than one dimension. See the supplement for potential risks and safeguards to consider.

Equity should be considered across each question. As you take inventory, consider who benefits, who may be excluded or harmed, whose perspectives are represented, and how AI may affect different communities or groups in different ways.

DIMENSION	HOW IS AI SHOWING UP IN YOUR ORGANIZATION?	WHERE DO YOU SEE OPPORTUNITIES EMERGING?	WHAT RISKS ARE YOU CONCERNED ABOUT?	HOW MIGHT THE COMMUNITIES YOU SERVE PERCEIVE OR EXPERIENCE HOW YOUR ORGANIZATION INFLUENCES AI?
Illustrative example	We are participating in coalitions and policy discussions about how government agencies use AI to make decisions that affect access to benefits and services.	We could use our expertise and relationships to shape policies and standards so that AI systems are more accountable to community needs.	AI policies may be developed without meaningful community input or may reinforce existing inequities.	Communities are concerned that AI is being used to make important eligibility decisions without their consent or ability to challenge an outcome. These concerns may reinforce their distrust.

Worksheet 2: Identify a primary dimension (or dimensions) to focus on in the near term

STEP 2 – IDENTIFY DIMENSIONS

2 Instructions: Based on what you identified in Worksheets 1a to 1c about how AI is showing up, and its emerging opportunities, potential risks, and community perspectives, decide where you want to focus most of your attention now. The goal is not to give equal attention to every dimension, but rather to choose the dimension(s) where AI is most likely to affect your ability to advance your mission in the near term, while identifying other dimensions about which you should stay informed.

Use the table below to identify the most important takeaways from your inventory for each dimension, then assess their strategic relevance and your organization’s readiness to act. Place a check mark next to every dimension that should be a primary focus.

DIMENSION	Observations from your inventory	How might this advance your strategic priorities?	Where do you have the assets, readiness, or credibility to make progress?	Decision: Check all dimensions that should be a primary focus
Illustrative example, Dimension 1: Augment	Staff are already using AI informally for drafting and research, and several teams see opportunities to enhance quality, reduce administrative burden, or increase speed.	Increased staff efficiency can enable more client-facing time.	There is leadership buy-in to dedicate time to creating AI policies.	✓



DIMENSION 1:
 AUGMENT



DIMENSION 2:
 ADVANCE



DIMENSION 3:
 ADVOCATE

Worksheet 3: Prioritize a small set of actions that can meaningfully and responsibly advance your goals

STEP 3 – PRIORITIZE ACTIONS

3 Instructions: Move from your dimension(s) of focus to a small number of actions that can meaningfully advance your goals. Concentrate most of your effort on your primary dimension(s) from Worksheet 2, and add a few low-investment, “no regrets” actions across the other dimensions to stay engaged without spreading yourself too thin. For each action, identify why it matters, what safeguards are needed, and the next steps required to move forward.

Brainstorm possible actions, then prioritize them based on their value to pursuing your mission and feasibility. See the supplements for ideas of “no regrets” actions, and potential risks and safeguards to consider.

PRIORITY ACTIONS				IMPLEMENTATION STEPS		
ACTION	DIMENSION	RATIONALE	SAFEGUARDS TO MITIGATE RISK	NEXT STEPS	OWNER	TIMELINE
Illustrative example: Adopt a responsible AI use policy and approved tool set for staff	Dimension 1: Augment	Turn informal use into safe, consistent practice.	Limit the types of client data that may be entered, require human review of outputs, provide staff training, offer a way to report concerns.	Draft policy, select approved tool, design and implement staff training.	Operations director	Q1-Q2
1.						
2.						
3.						
4.						

Worksheet 4: Invest in learning and experimentation alongside implementation

STEP 4 – INVEST IN LEARNING AND EXPERIMENTATION

4 Instructions: For each priority action from Worksheet 3, define what you hope to learn, how you will test or experiment, what outcomes you expect to see, and what would cause you to stop, pause, or change course. Revisit your actions periodically as AI capabilities, tools, costs, risks, regulations, policies, and field norms evolve.

The examples are illustrative only. Replace them with responses that reflect your organization’s mission, context, and current experience.

				REVISIT EVERY 6 MONTHS AFTER INITIAL EXERCISE		
PRIORITY ACTION	WHAT ARE YOU HOPING TO LEARN?	HOW WILL YOU TEST OR EXPERIMENT?	WHEN WOULD YOU EXPECT TO SEE THIS LEARNING OUTCOME?	WHAT WOULD CAUSE YOU TO STOP, PAUSE, OR CHANGE COURSE?	WHAT HAS CHANGED IN AI CAPABILITIES, TOOLS, OR COSTS?	WHAT HAS CHANGED IN RISKS, REGULATION, POLICY, OR FIELD NORMS?
Illustrative example: Adopt a responsible AI use policy and approved tool set for staff.	Where AI can save the most time for staff; where staff or clients have quality concerns.	Run a 90-day pilot with two teams and track time saved, output quality, errors, and staff feedback.	Review early findings after 30 days and full pilot results after 90 days.	A data exposure incident, recurring inaccurate outputs, evidence of unequal impact, or no measurable benefit.	New lower-cost tools	Changing norms around funder expectations on AI disclosure
1.						
2.						
3.						
4.						

Board worksheet: Clarify the board’s role in AI oversight

Instructions: Use this worksheet to identify the AI-related questions that warrant board discussion and oversight. The board should not select or implement AI tools. Its role is to help set direction, ensure the organization has the necessary resources, establish principles and guardrails, assess risk, and support executive leadership. Select the questions that are most relevant to your organization. Revisit them regularly as the technology, organizational context, and external environment change.

Area for board consideration	Questions for discussion with your board	Board role or next step
Set direction and strategy	- In what ways can AI enable or amplify elements of our strategy? - How might broader AI and technology trends affect our strategy, theory of change, or community needs? How are we preparing? - How does our current use of AI create or expose us to risk? What principles should guide our approach to AI use?	
Ensure the necessary resources	- Have we considered the full costs of AI-related investments, including experimentation, design, implementation, training, evaluation, and ongoing maintenance? - Where are our data, tech, and AI skill gaps as a board, and what is our plan for addressing them? - How can the board support executive leadership to lead effectively on AI and technology?	
Provide oversight	- What data privacy, security, legal, ethical, equity, accessibility, or reputational risks should the board understand? - Which AI-related decisions require human review, community input, or additional safeguards? - How will the organization assess results, and when to stop, pause, or change course?	
Board operations	- Are responsibilities for AI and technology oversight clear between the board, board committees, and the leadership team? - Would a technology-focused board member, external adviser, or community advisory group strengthen governance? - How will the board build its own understanding of AI and monitor changes over time?	

Note: This worksheet draws from Nonprofit Tech Governance Congress, 28 Questions for Nonprofit Boards on Technology and Innovation, board.dev’s resources, and Bridgespan’s Nonprofit Board Resource Center.

Supplement: “No regrets” starting points for organizations with limited resources

Organizations with limited resources do not need to launch separate initiatives across all three dimensions. They can begin with practical actions that help them learn, reduce risk, and make better choices over time.

DIMENSION 1: AUGMENT	DIMENSION 2: ADVANCE	DIMENSION 3: ADVOCATE
• Establish internal policies or disclosure practices for responsible AI use. • Take inventory of existing data, workflows, and operational bottlenecks. • Identify one or two low-risk use cases with clear operational value.	• Learn from peer organizations experimenting with AI in the field. • Explore one or two mission-aligned use cases with potential to improve reach or outcomes. • Explore accelerators, technical assistance, or AI capacity-building opportunities.	• Stay informed about emerging AI risks and safeguards relevant to the field. • Share lessons and concerns with peer organizations, intermediaries, and field leaders.

Supplement: Potential risks and safeguards to consider

Risk category	Illustrative examples of how the risk may show up	Key questions to identify potential risks	Example mitigation tactics
Data privacy	A case manager pastes client notes containing immigration status or health information into a public AI tool.	Where could AI expose sensitive or personally identifiable information about clients, communities, staff, or partners, or weaken protections around data entrusted to the organization?	Limit what data can be entered into AI tools; restrict using sensitive or personally identifiable information; create a responsible AI use policy; clarify approved AI tools; review vendor data retention, training, policies, and sharing practices.
Equity	A screening tool consistently rates applicants with nontraditional education experiences lower than otherwise similar applicants.	Where could AI reinforce bias, deepen inequities, or exclude people from access or opportunity, or distribute benefits and harms unevenly?	Test outputs across different populations and refine approach; monitor for disparate impact; involve community members in design and review.
Agency	A client receives AI-generated guidance without having a way to request human support.	Where could AI limit the voice, consent, choice, or control of the people and communities most affected by the organization’s work?	Use consent-based approaches; preserve access to human support; clearly explain how AI is used; involve community members and staff in design, testing, and review.
Accountability	Staff act on an inaccurate eligibility assessment because it appears authoritative and no one is assigned to verify it.	Where could AI produce inaccurate, low-quality or generic outputs, and who remains accountable for decisions, services, or guidance shaped by AI?	Require human review for high-stakes uses; define decision ownership; set quality standards.
Workforce	AI-generated performance reviews based on employees’ computer activity increase staff surveillance and disadvantage employees whose work is less easily quantified.	Where could AI change roles, reduce autonomy, increase surveillance, displace work, or create new expectations for staff without adequate support?	Communicate with staff early; provide training and support; limit use of AI for performance management.
Credibility	Community members are not informed when and how AI is being used or perceive the organization as replacing trusted human relationships with technology.	Where could AI weaken trust with communities, staff, partners, funders, or the field?	Be transparent about AI use; start with lower-risk use cases; share what is being learned, including failures and changes made in response; consider whether vendor practices and business models align with organizational values.
Environment	The organization uses a resource-intensive model for routine tasks that could be completed with a simpler tool.	Where could AI increase energy, emissions, or water use, and which communities may bear those costs?	Use fit-for-purpose tools; avoid more resource-intensive models when simpler tools are sufficient; engage vendors to assess environmental practices and available impact information.

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