

Intercloud9
Artificial Intelligence (AI) Maturity Model for Membership and Non-profit Organisations

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What are the key challenges facing membership and non-profit organisations in terms of AI adoption?

We recognise that non-profit organisations often face a distinct, unique set of challenges when it comes to adopting and benefiting from AI technologies. These include:

1 Limited Resources and Capacity

Budget Constraints: Non-profits typically operate on tight budgets. Investing in AI, whether it's acquiring advanced technology or training staff, can be costly and sometimes difficult to justify against other urgent priorities.

Human Resources: Many non-profits have lean teams with limited technical expertise. They may not have dedicated IT departments or in-house specialists who can lead AI initiatives, making implementation and maintenance more challenging.

2 Lack of Technical Expertise and Trustee Knowledge

Board and Leadership Challenges: Trustee boards and senior management often hold decision-making power but may lack deep technical knowledge. This can result in a reluctance to adopt new, complex technologies or cause delays in strategic decision-making.

Skill Gaps: Without sufficient internal expertise, non-profits may struggle to identify the most appropriate AI tools or to understand how to integrate them effectively into existing processes.

3 Staff Scepticism and Change Management Issues

Trust and Adoption Concerns: Staff might be sceptical about the impact of AI on their roles, fearing that automation could reduce the need for human input. Misconceptions about job displacement can lead to resistance.

Cultural Barriers: Successfully implementing AI often requires significant changes to existing workflows and organisational culture. Non-profits, which frequently operate under resource and time pressures, may find it difficult to commit to the kind of organisational change needed.

4 Data Quality and Infrastructure Limitations

Data Collection and Integration: Many non-profits maintain data in disparate or outdated systems. The absence of a coherent data infrastructure can make it difficult to leverage AI, which relies on clean, structured, and high-quality data.

Data Governance: Without robust data governance and management policies, ensuring data accuracy, consistency, and privacy becomes a considerable challenge, potentially reducing the effectiveness of AI implementations.

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5 Ethical, Privacy, and Regulatory Concerns

Data Privacy: Non-profits often handle sensitive information, such as member or beneficiary data. Adopting AI raises important questions about data security, consent, and compliance with privacy regulations (e.g. GDPR), which can be a significant barrier.

Ethical Considerations: There is a strong need for transparency in how decisions are made by AI systems. Non-profits must ensure that AI is used ethically, avoiding bias and protecting the interests of the communities they serve.

Regulatory Uncertainty: Evolving regulations around AI use mean organisations must stay abreast of legal requirements, which can be difficult without specialised knowledge or dedicated legal support.

6 Integration with Existing Systems

Legacy Systems: Many non-profits rely on legacy systems or basic technology stacks that may not be compatible with modern AI tools. The process of integrating new AI solutions with existing systems can be both technically and operationally challenging.

Scalability Issues: Even if a pilot project is successful, scaling AI solutions across the organisation while maintaining performance, security, and compliance can require significant additional investment and planning.

Whilst AI has the potential to transform operations, engagement, and impact for membership and non-profit organisations, these benefits are tempered by real-world challenges. Addressing budgetary and resource constraints, closing the skill gap, managing staff concerns, improving data practices, and ensuring ethical and regulatory compliance are all critical steps for non-profits looking to leverage the benefits of AI successfully.

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How does the AI Maturity Model help membership and non-profit organisations?

An AI maturity model can be especially beneficial for non-profit organisations for several reasons:

1 Strategic Clarity and Direction

Assessment of Readiness: The model provides a structured framework to help non-profits assess their current level of AI readiness. By identifying where they stand from minimal awareness to fully optimised AI capabilities, organisations can pinpoint specific gaps and opportunities for improvement.

Roadmap for Adoption: It offers a clear pathway for progression, detailing concrete steps and actions needed to move from one stage to the next. This roadmap helps leadership prioritise investments and training initiatives, ensuring that any AI adoption is deliberate, measured, and aligned with organisational goals.

2 Resource Optimisation

Efficient Use of Limited Resources: Non-profits often face constraints in terms of budget, staff, and technical expertise. An AI maturity model helps in focusing scarce resources on initiatives that promise the greatest impact, whether it is small pilots that demonstrate quick wins or targeted training programmes that build capacity gradually.

Avoiding Wasted Effort: With a structured approach, non-profits are less likely to embark on ad hoc or overly ambitious AI projects that exceed their capacity. It minimises risks by emphasising early-stage awareness and manageable, scalable pilots.

3 Enhanced Governance and Risk Management

Ethical and Privacy Considerations: The model incorporates dimensions such as governance, ethics, data privacy, and internal policies. This is crucial for non-profits, which must maintain trust with their stakeholders donors, members, and the wider public. By embedding robust governance and ethical oversight into the framework, organisations can ensure that AI is implemented responsibly and in accordance with data protection regulations.

Trust and Transparency: Regular assessments and updates along the maturity curve can build a culture of transparency. Clear internal policies and governance structures help mitigate risks (such as potential biases or data mishandling) and support informed decision-making by boards and trustees.

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4 Empowering Leadership and Stakeholder Engagement

Informed Trustees: Many non-profit organisations are governed by trustee boards that may not have a technical background. An AI maturity model, with its clear stages and assessment criteria, can help board members understand the strategic implications of AI, enabling them to ask the right questions and provide better oversight.

Staff Engagement: The model also focuses on people and training, addressing common scepticism among staff. By charting a learning curve and involving staff in pilot projects, organisations can demystify AI and illustrate its tangible benefits. This can lead to a more inclusive culture where innovation is embraced, and staff feel empowered to contribute.

5 Alignment with Organisational Mission

Mission-Driven AI Implementation: For non-profits, maintaining alignment with their core mission is paramount. An AI maturity model ensures that AI initiatives are not adopted for technology's sake but are evaluated against the organisation's strategic objectives. Whether it is enhancing member engagement, improving operational efficiency, or increasing fundraising effectiveness, the model keeps the focus on delivering mission-critical outcomes.

Continuous Improvement: By tracking progress over time, organisations can adapt to emerging trends and technologies. This iterative process encourages continuous learning and improvement, ensuring that the organisation remains agile and responsive to both opportunities and challenges in the rapidly evolving AI landscape.

An AI maturity model acts as a diagnostic and planning tool tailored to the unique environment of membership and non-profit organisations. It helps balance ambition with practical limitations, ensuring that AI investments are ethical, effective, and aligned with the organisation's mission and values. This structured approach not only optimises resource use but also fosters a culture of innovation and trust, enabling non-profits to harness AI for greater social impact.

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An overview of the AI Maturity Model from Intercloud9

The model comprises of five stages:

1. **Nascent** | 2. **Exploring** | 3. **Developing** | 4. **Integrated** |

5. **Optimised**

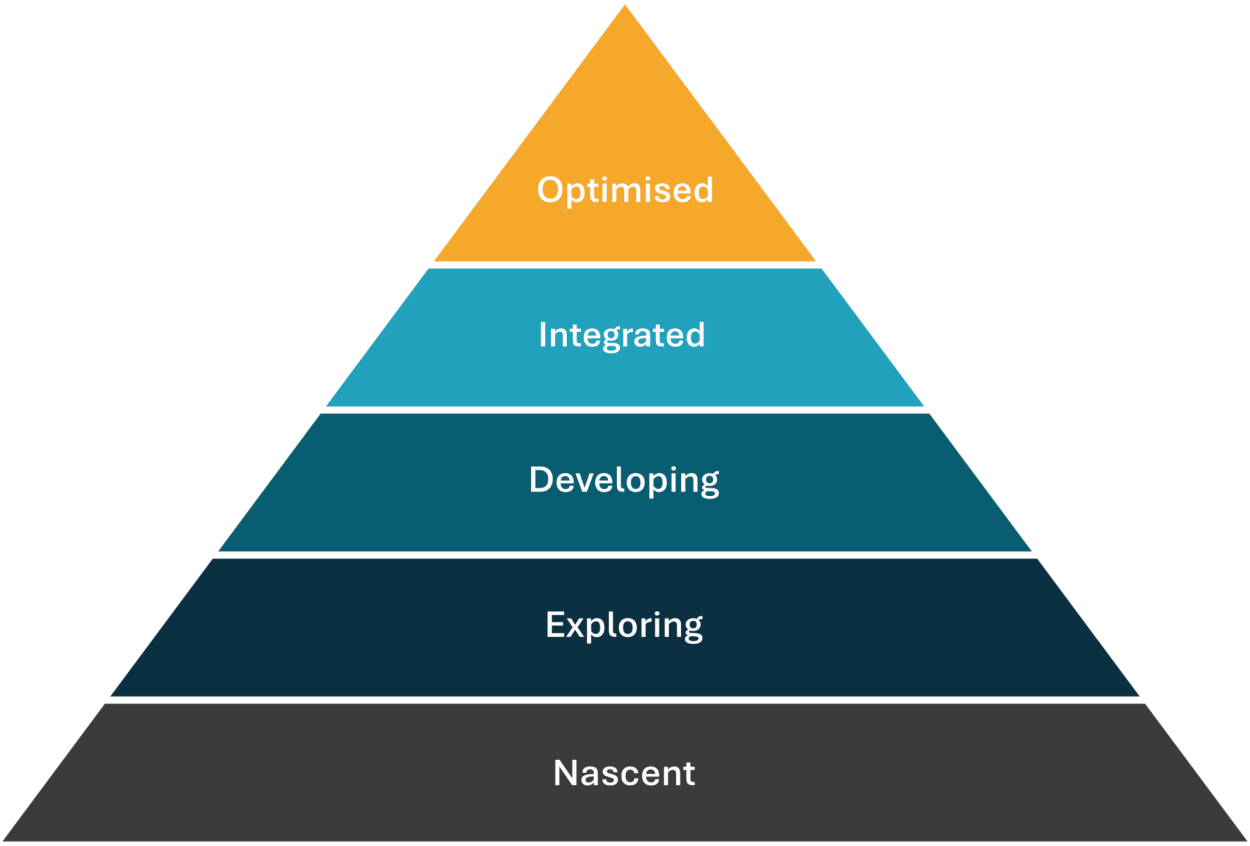


Figure (1) Intercloud9's AI Maturity Model

Nascent: At the Nascent stage, the organisation has minimal recognition of AI, with staff and trustees largely uninformed about its potential. Data practices are fragmented, and there are virtually no internal policies or strategies for AI adoption.

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Exploring: In the Exploring stage, initial pilot projects and informal training begin to surface, revealing the organisation's budding interest in AI. Basic data standardisation efforts and preliminary ethical considerations signal the early formation of AI-related governance.

Developing: At the Developing stage, AI is actively integrated into select functions with structured pilot projects and emerging internal expertise. Regular audits, defined data governance roles, and the formulation of formal policies for data privacy and ethics lay the foundation for broader AI adoption.

Integrated: In the Integrated stage, AI is systematically embedded across core workflows, driving routine decision-making with high-quality, structured data. Robust training programmes, comprehensive internal policies, and active trustee oversight ensure ethical and seamless AI integration.

Optimised: At the Optimised stage, AI is fully woven into the organisational fabric, powering real-time strategic insights and continuous innovation. Advanced data management, dynamic policies that evolve with regulatory changes, and ongoing external audits position the organisation as a leader in ethical, mission-aligned AI adoption.

Detailed Stage Descriptions

Each stage is considered across the following areas:

1. **People** | 2. **Processes** | 3. **Technology** | 4. **Data** |

5. **Governance & Ethics (including privacy, data and internal policies)**

Membership and non-profit organisations face specific challenges such as trustee boards that have decision-making power but might lack technical expertise, limited in-house capacity for complex change and staff scepticism or mistrust towards AI. This model is designed to highlight those issues and provide practical steps to move up the maturity ladder.

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The AI Maturity Model 5 Stages

The table below describes each of the 5 stages of AI maturity in further detail, offering recommendations around what membership and non-profit organisations may want to consider to achieve progression through the maturity model.

Stage 1: Nascent					
	People	**Processes**	**Technology**	**Data**	**Governance & Ethics**
Observations	Staff have little to no awareness of AI; trustees and leadership do not yet see AI as relevant.	All processes are manual and reactive; AI is not a subject of strategic discussion or planning.	The organisation uses only standard office tools, with no AI functionality or supportive infrastructure.	Data practices are incidental or ad hoc, stored in spreadsheets or legacy systems with little structure.	No internal AI policy exists; privacy training is minimal (often limited to GDPR basics); trustees are not aware of AI's potential risks.
Recommendations	Organise basic awareness sessions and introductory training in plain language to spark interest and demystify AI. Identify early "AI ambassadors" even if only on a volunteer basis.	Begin documenting key processes and note where automation might later bring benefits.	Assess current IT capabilities and inventory data sources that could, in future, be leveraged by AI.	Conduct a basic review to identify key data sources and gaps; start thinking about the role data will play in future AI projects.	Draft an introductory statement on AI use and data handling, highlighting the need for future policies, and schedule briefing sessions for trustees. Introduce an AI Acceptable Use Policy.

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Stage 2: Exploring

	People	Processes	Technology	Data	Governance & Ethics
Observations	Some staff show curiosity about AI and may start informal self-training; trustees and senior leaders begin discussing its potential, though apprehension remains among many staff.	Small-scale pilots (e.g. a basic chatbot for FAQs) or experiments are being tested, though these are largely ad hoc.	There are early trials of stand-alone AI tools, but the overall system remains disjointed.	There is growing interest in structured data; initial efforts are made to clean and standardise data to support pilot projects.	Awareness of privacy, fairness and ethical AI begins to appear informally; current data protection policies are updated for pilot projects, though there is no formal AI policy yet.
Recommendations	Facilitate initial workshops and invite external speakers on AI in the non-profit sector to build a foundational understanding.	Create a list of potential pilot projects and establish a clear feedback loop with staff about their outcomes and learnings.	Explore budget-friendly, off-the-shelf AI solutions that can be trialled on a limited scale.	Begin implementing basic data quality checks and standardisation processes. Document where the data comes from and how it is used.	Develop a short AI and Ethics charter. Incorporate AI-specific scenarios (such as consent and anonymisation) into existing privacy training programmes.

Stage 3: Developing

	People	Processes	Technology	Data	Governance & Ethics
Observations	Some departments actively use AI tools for specific functions (e.g. membership analytics); internal AI champions or dedicated working groups begin to emerge.	AI is now used to inform decision-making in certain projects. Pilot outcomes are feeding into process redesign (e.g. predictive analytics for fundraising).	Multiple pilots are running concurrently, although integration between systems is still limited.	Data capture becomes more intentional with regular audits and validation checks. Governance roles start to be defined.	Formal policies start emerging that incorporate AI, including sections on data usage, consent, and bias mitigation. Trustees request more structured compliance information.
Recommendations	Introduce structured training programmes and allocate responsibilities for managing AI projects; encourage mentorship initiatives internally.	Document and standardise successful pilot processes so they can be scaled; create clear roadmaps for change management.	Plan integrations between pilot systems and legacy IT; invest in a unified platform when budget permits.	Establish a data governance framework, appoint data stewards and schedule periodic data quality audits.	Implement an AI Risk Checklist and ensure all pilots undergo Privacy Impact Assessments (PIAs) or Data Protection Impact Assessments (DPIAs). Formalise internal guidelines to govern AI use.

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Stage 4: Integrated

	People	Processes	Technology	Data	Governance & Ethics
Observations	AI is accepted as part of everyday work; staff widely use AI tools, and ongoing capacity-building initiatives (training, advanced courses) are in place.	AI is embedded in critical functions like fundraising, member engagement and communication. Decision-making processes routinely utilise AI-generated insights.	AI systems are well integrated across departments; the organisation's infrastructure supports both moderate and advanced AI workloads.	Data is high quality, well-structured and actively supports AI initiatives. There is a consistent approach to data integrity and metadata management.	A comprehensive internal AI policy exists. Regular DPIAs are conducted, and AI solutions undergo transparent ethical reviews. Trustees actively review the organisation's AI performance.
Recommendations	Expand regular AI training and formalise communities of practice; include trustees in ongoing training sessions to enhance oversight.	Standardise AI practices across teams with a company-wide roadmap. Ensure continuous improvement practices are in place to incorporate lessons learned.	Invest in scalable, secure technology platforms and ensure maintenance procedures are in place to support integration.	Leverage data dashboards and real-time monitoring tools to support ongoing projects; maintain strict quality assurance processes.	Embed regular privacy and data ethics reviews in project lifecycles and share simplified versions of your AI principles with all stakeholders (staff, trustees, and members).

Stage 5: Optimised

	People	Processes	Technology	Data	Governance & Ethics
Observations	AI is fully integrated into the organisational culture. Staff are empowered to innovate with AI, and trustees maintain a strong strategic oversight with updated knowledge of emerging AI trends.	Decision-making is predominantly driven by AI insights, and continuous process improvements are evident in all areas. There is a proactive approach to change management.	A sophisticated and comprehensive AI ecosystem underpins the organisation's operations. Systems are seamlessly integrated and optimised for efficiency and security.	Data is managed as a strategic asset, with real-time analytics and comprehensive data governance frameworks in place.	The organisation has advanced, dynamic policies that govern all aspects of AI use. An ethical oversight board or AI steering group meets regularly, ensuring transparency, accountability, and compliance with the latest privacy standards.
Recommendations	Continue to invest in professional development and maintain a mentorship programme; foster an innovative culture where staff regularly propose new AI initiatives.	Routinely review and refine processes based on AI performance metrics; implement agile project management techniques to ensure responsiveness to technological advances.	Maintain a regular upgrade cycle for technological infrastructure; incorporate emerging AI technologies after careful evaluation.	Use advanced analytics and algorithmic audits to continually ensure data integrity and ethical use; proactively update data policies to reflect global and local regulatory changes.	Update internal AI and data policies routinely; engage external auditors or experts to perform periodic reviews; provide public transparency reports and dashboards to maintain member trust.

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Summary Table - Key Themes per Stage

Stage	Data Monthly	Privacy Practices	Internal Policies
Unaware	Incidental, fragmented; no structure	Minimal or basic GDPR awareness	None or outdated; minimal AI risk management
Exploring	Initial structure emerging; basic cleaning	Early ethical concerns and pilot tweaks	Draft AI principles; informal updates
Developing	More structured with regular audits	Formal risk consideration; PIAs/DPIAs begin	Formal policies in pilot-level use
Integrated	High-quality, governed; real-time	DPIAs routinely embedded; regular training	Comprehensive, standardised, transparent
Optimised	Managed as a strategic asset; integrated	Advanced risk and ethics management practices	Dynamic, routinely updated; shared with all

How to Use This Integrated Model

1 Assess Your Current Stage

Compare your organisation's practices across People, Processes, Technology, Data and Governance & Ethics to determine which stage best represents your current AI maturity.

2 Identify Gaps

Use the observations and recommendations in each area to recognise gaps especially around privacy, data quality and internal policy that could impede progress.

3 Plan Your Next Steps

Prioritise actions to move to the next stage, such as investing in training, formalising policies, enhancing data governance and engaging trustees with targeted briefings.

4 Engage All Stakeholders

Involve staff, leadership and trustees alike by sharing clear dashboards, policies and training programmes so that everyone understands the benefits, risks and planned journey.

5 Monitor and Review

Periodically revisit this model to track progress, update policies in line with new regulations and industry best practices, and ensure that AI adoption continues to align with your mission.

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