

AI MATURITY SELF-ASSESSMENT

How to Use

- Print this sheet
- For each statement, place a tick mark ✓ on the number (1–5) you feel is your most appropriate current state

Scale: 1 = Not at all 3 = Partially 5 = Fully in place

#	Assessment Question	1	2	3	4	5
1	We use AI tools (ChatGPT, Gemini) in everyday work	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2	We use AI for real outcomes (donor emails, grants, reports, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3	We review AI output before using it	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4	We use AI inside tools we already use (email, CRM, docs)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5	Some tasks are automated (emails, reminders, follow-ups)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6	Our data (donors, programs) is clean and usable	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7	Our team is comfortable using AI tools	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8	We know where AI should and should NOT be used	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
9	We are careful about what data we share with AI tools	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
10	We are seeing real results (time saved or better outcomes)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Your Score:

Total Score (out of 50): _____



How To Interpret Your Score

10 - 25 → **Beginner:** You are just starting or experimenting.

What to do next:

- Use AI for simple tasks (emails, summaries)
 - Focus on learning how tools work
 - Keep everything human-reviewed
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26 - 40 → **Intermediate:** You are using AI regularly in some areas.

What to do next:

- Standardize 2–3 workflows (donor emails, grant drafts)
 - Introduce basic automation (email sequences, follow-ups)
 - Start using AI inside your existing tools
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41 - 50 → **Advanced:** AI is part of how your organization operates.

What to do next:

- Integrate AI into systems (CRM, email platforms)
 - Track performance and outcomes
 - Optimize and scale usage across teams
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BEGINNER level - AI Adoption Plan

30 Days (Start)	60 Days (Repeat)	90 Days (Stabilize)
<p>1. Use ChatGPT / Gemini daily for simple tasks (drafting, summarizing)</p> <p>2. Identify 3–5 repeatable tasks/processes where AI can help</p> <p>3. Identify an AI owner + 1 or 2 key stakeholders to drive adoption</p> <p>4. Save 3 - 5 effective prompts in a shared document</p> <p>5. Run 1 basic training session on ChatGPT / Gemini usage</p>	<p>1. Use ChatGPT / Gemini consistently for 2 – 3 selected tasks</p> <p>2. Standardize those tasks using simple AI workflows</p> <p>3. Define roles: who uses AI vs who reviews outputs</p> <p>4. Build a shared prompt library for team use</p> <p>5. Ensure team uses AI tools weekly for selected tasks</p>	<p>1. Make ChatGPT / Gemini the default for those tasks</p> <p>2. Add 1 new task/process using AI</p> <p>3. Expand ownership across teams (more users, same standards)</p> <p>4. Refine and improve prompts based on usage</p> <p>5. Ensure team uses AI tools daily for selected tasks</p>



INTERMEDIATE level - AI Adoption Plan

30 Days (Start)	60 Days (Repeat)	90 Days (Stabilize)
<p>1. Audit current AI usage across team (ChatGPT / Gemini, tools)</p> <p>2. Identify and finalize 3 – 5 repeatable tasks for AI use</p> <p>3. Define where AI is allowed and where human review is mandatory</p> <p>4. Standardize prompts and templates in a shared library</p> <p>5. Assign clear ownership (AI lead + reviewers)</p>	<p>1. Use AI inside tools (Google Workspace, Microsoft 365, email platforms)</p> <p>2. Build simple workflows combining tools + AI (draft → review → send)</p> <p>3. Set up basic automation (email scheduling, responses, reminders)</p> <p>4. Ensure consistent team usage of prompts/templates</p> <p>5. Track performance (time saved, output quality)</p>	<p>1. Make AI-enabled workflows the default for selected processes</p> <p>2. Expand AI usage to 1 – 2 additional processes</p> <p>3. Increase automation coverage across tasks</p> <p>4. Continuously refine prompts based on outcomes</p> <p>5. Optimize based on measurable improvements (efficiency, consistency)</p>

