

# AI EQUITY CHECKLIST



## FOR FUNDRAISERS

Use this checklist every time you want to adopt any AI tool for fundraising.

THIS RESOURCE IS PART OF AI EQUITY PROJECT 2026

PRODUCED BY NAMASTE DATA





## WHY THIS RESOURCE EXISTS?



This checklist exists to give nonprofit fundraisers a simple, practical way to think before adopting a new AI tool. Rather than assuming every new tool is neutral, necessary, or ready for your work, it invites teams to pause and consider questions of trust, equity, privacy, donor experience, and real organizational fit.

Developed as part of the AI Equity Project 2026, this resource is one piece of a broader effort to bring the sector fresh research, usable worksheets, shared learning, and stronger collective guidance for building more responsible, human-centered AI practices.

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**Use this checklist before adopting any AI tool for fundraising, donor communications, or grant writing.**

## **BEFORE YOU ADOPT AN AI TOOL**

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### **1 Purpose & Need**

- I can explain in plain language what this AI will do.
- I can explain why our mission needs it.
- My team has an AI Policy we can access and use.

### **2 Data & Privacy**

- I know what donor and community data this AI will access.
- This AI solution will not NOT use highly sensitive information (immigration status, health data, etc.)
- I have checked if the AI tool stores or trains on our data.
- If it's a free tool, I am learning about the risks to make intentional choice about its long-term use.

*Remember: If the vendor of this AI product can't clearly explain their data practices, don't use it.*

### **3 Bias & Fairness**

- I have and will continue to ask: Could this AI reproduce historical biases in who gets benefits or attention?
- I have considered with my team the harms this AI can produce; and we are working on managing it.
- If this AI makes recommendations (e.g. donor prospecting), my team and I know how it decides.

### **4 Transparency & Consent**

- We have a plan on when donors will know when AI is being used.
- We have language ready for how to disclose AI use.
- We provide/will provide options to people to opt out or ask questions about our AI use if they want to.

### **5 Oversight & Accountability**

- We have/building a plan on how we can monitor/evaluate this AI
- We have/building a plan on how to pause or stop the AI if something goes wrong
- We have/building a plan for what to do if the AI causes harm (e.g. sends an offensive email)

### **6 Alternatives Considered**

- We have considered: How can we ensure human exists in the loop with the use of this AI solution?
- We have considered: What do we lose by automating/using this AI?
- We have confirmed: Using this AI solution won't damage relationships we have spent years building

**7 Resources & Support**

- We have budget for a paid enterprise version (not just free tools)
- Staff have been trained on how to use this responsibly
- We have time to review AI outputs before they go to donors or funders

**8 Evaluation Plan**

- We have a review process to assess if this is working
- We are tracking: Is this helping or hurting donor relationships?
- We are willing to intentionally pause and assess our path ahead if AI does not seem to be working.

**RED FLAGS: STOP AND REASSESS**

Stop and reassess your AI use if

- ! Board/funder is pressuring you to use AI but you are not ready**
- ! You are using free tools with sensitive donor or community data**
- ! You don't know how the AI makes decisions**
- ! Your organization has no AI policy or approval process**
- ! Staff are paying for AI tools personally (not reimbursed)**
- ! You aren't sure how your donors and community members affected with the AI use**

**WHAT TO DO IF YOU SEE A RED FLAG**

1. Pause. Don't adopt the tool before you have addressed the red flag.
2. Bring it to leadership. This isn't your decision alone.
3. Ask for what you need: budget, policy, training, time.
4. Remember: Saying 'not yet' is responsible, not obstructionist.

**QUESTIONS TO ASK FUNDERS USING AI**

If a funder tells you they are using AI to review grants, ask:

- What criteria does the AI use to evaluate applications?
- Has the AI been tested for bias against organizations like ours?
- Is there a human review process?
- Can I appeal if I think the AI made an error?
- Will you share how the AI made its decision?