



ENDPOINT SOLUTIONS

AI Readiness — Delivery Report



Client: Community Roots Alliance

Date: 2026-06-08

Prepared by: Michael-Paul Hart, Endpoint Solutions

Confidential — prepared for Community Roots Alliance leadership. Not for distribution.

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OVERALL MATURITY

38

Emerging

Combined maturity across the assessed stages.

ENGAGEMENT

Industry: Nonprofit / human services

Primary sponsor: Priya Nandakumar, Executive Director

Executive summary

Community Roots is early on AI, which is understandable for a lean, mission-focused organization stewarding sensitive client and donor data. Data is siloed and hard to access, there is no policy, and skills are thin. But there are two or three genuinely high-value, low-cost use cases — grant writing, donor communications, and program reporting — that could give a small team real capacity back. The path is deliberate: put a simple data-handling and AI policy in place, then pilot AI-assisted grant writing, which is where the return is fastest and the risk lowest.

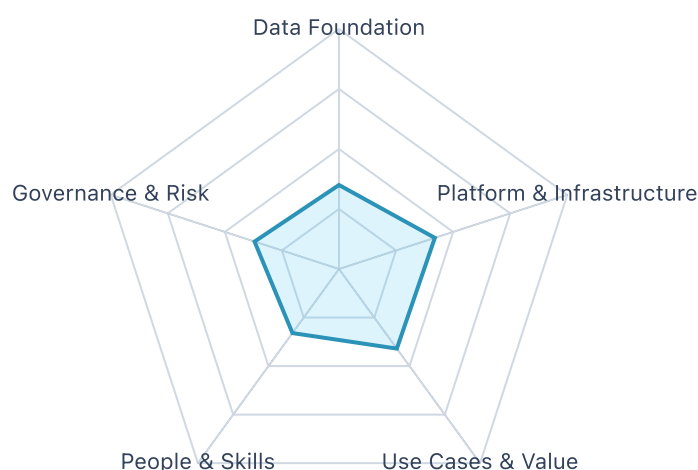
Current-state overview

Technology centers on a donor/CRM system and a lot of spreadsheets, with program and outcomes data spread across tools and hard to pull together for reporting. M365/Copilot is available but lightly used. Staff are stretched, AI literacy is low, and there is no in-house technical skill. A few staff have tried consumer AI for writing, but there is no policy and no clarity on what client or donor data may be used. Leadership sees grant writing and reporting as obvious opportunities but has not formalized ownership or guardrails.

Maturity scorecard

STAGE	SCORE	INTERPRETATION
01 Data Foundation	35%	Emerging
02 Platform & Infrastructure	42%	Developing
03 Use Cases & Value	41%	Developing
04 People & Skills	33%	Emerging
05 Governance & Risk	37%	Emerging

Maturity profile



Top findings & business implications

- Grant writing and reporting are the clearest, highest-value AI wins** — AI-assisted grant drafting and program/impact reporting directly expand the capacity of a small team and can improve funding outcomes — the standout first moves.
- Siloed, hard-to-access data blocks reporting and AI alike** — Program and outcomes data is scattered, so even basic funder reporting takes days; this is the foundational constraint on both efficiency and AI.
- No AI or data-handling policy around sensitive client/donor data** — Before AI touches client or donor information, the organization needs a simple policy and clear ownership — neither exists yet.

Domain observations

01 · DATA FOUNDATION — 35%

Mostly siloed across the CRM and spreadsheets with informal governance and hard access. Quality is inconsistent, which makes both reporting and AI harder. Consolidating for reporting is a win on its own.

02 · PLATFORM & INFRASTRUCTURE — 42%

A hybrid setup with M365/Copilot available but no AI tooling in real use and no integration. Introducing AI means leaning on vendor-hosted, supported tools rather than anything built in-house.

03 · USE CASES & VALUE — 41%

A few strong ideas — grant writing, donor/constituent communications, and program/impact reporting — but none piloted, value unquantified, and ownership informal. Grant writing is the clear first move.

04 · PEOPLE & SKILLS — 33%

AI literacy is low, there is no in-house skill or training, and a stretched team manages change informally. Adoption will hinge on a very light lift and a fast, visible win.

05 · GOVERNANCE & RISK — 37%

No AI or data-handling policy, some consumer-AI experimentation at the edges, basic security, and unclear accountability — the gating issue given the sensitivity of client and donor data.

Risk register

RISK	AREA	SEVERITY	OWNER
Sensitive client / donor data used in unvetted AI tools	Governance & Risk	Critical	Executive Director
No AI or data-handling policy and unclear ownership	Governance & Risk	High	Operations
Program/outcomes data too siloed for reporting or AI	Data Foundation	High	Programs
Capacity strain — the problem AI would help solve	Use Cases & Value	Medium	Executive Director

Recommended priorities

05 · GOVERNANCE & RISK

Put a simple AI + data-handling policy in place

Define what client and donor data may be used, license an approved tool, and name an owner — the prerequisite for safe adoption.

03 · USE CASES & VALUE

Pilot AI-assisted grant writing

Run a low-cost, high-return pilot on grant drafting and reporting to prove capacity gains before expanding.

AI readiness roadmap

0–30 days

ACTION	OWNER	PRIORITY	EFFORT
Adopt a one-page AI + data-handling policy; license an approved tool for staff Outcome: A safe, sanctioned starting point · Vendor: Endpoint	Executive Director	High	Low
Name an AI owner and confirm what program/donor data can be used Outcome: Ownership + clear boundaries	Operations	High	Low

31–90 days

ACTION	OWNER	PRIORITY	EFFORT
Pilot AI-assisted grant writing and funder reporting with one program team Outcome: Faster grants; proven capacity gain · Vendor: Endpoint · Depends on: Policy in place	Programs	High	Medium

91–180 days

ACTION	OWNER	PRIORITY	EFFORT
Consolidate program/outcomes data for easier reporting Outcome: Reporting in hours, not days · Vendor: Endpoint	Programs	Medium	Medium
Light AI-awareness session for staff and volunteers Outcome: Shared understanding + trust	Operations	Medium	Low

181–365 days

ACTION	OWNER	PRIORITY	EFFORT
If the pilot lands, expand to donor communications and volunteer coordination Outcome: More mission capacity from the same team · Vendor: Endpoint · Depends on: Pilot results	Executive Director	Medium	Medium

AI tools & vendor ecosystem

VENDOR	ROLE / COVERAGE	RENEWAL / NOTES
Donor / CRM system	Donors, constituents, gifts	Annual — 09/2026
Microsoft 365 / Copilot (nonprofit)	Productivity + AI assistant	Annual — 03/2027
Grants / outcomes tracking	Grant and program reporting	Annual — 06/2027

Documentation reviewed: Security, privacy & compliance policies (data handling) · Cloud & infrastructure overview (where workloads run) · KPIs / metrics the business wants AI to improve

Evidence notes: No AI or data-handling policy exists. No data catalog beyond the CRM, and no AI vendor agreements. Sensitivity of client and donor data is the defining constraint.

Renewal & contract calendar

RENEWAL	VENDOR	ROLE / COVERAGE
Annual — 09/2026	Donor / CRM system	Donors, constituents, gifts
Annual — 03/2027	Microsoft 365 / Copilot (nonprofit)	Productivity + AI assistant
Annual — 06/2027	Grants / outcomes tracking	Grant and program reporting

Next steps

1. Review this report with leadership and confirm the priorities.
2. Assign owners and target dates to the roadmap actions.
3. Decide where ongoing technology advisory support is appropriate.

Appendix — discovery responses

01 • Data Foundation

How centralized is your business data?	Mostly siloed
Confidence in data quality / consistency	Mixed
Data governance in place?	Informal
How easily can teams access the data they need?	Hard
Data types you want AI to use	Structured/DB, Documents

02 • Platform & Infrastructure

Primary environment for workloads	Hybrid
AI / automation tooling in use	Copilot/M365
Path from pilot to production	None
How integrated are core systems?	Siloed

03 • Use Cases & Value

Have you identified AI use cases?	A few ideas
Are success metrics defined?	No
AI pilots underway?	Exploring
Who drives AI use cases?	Business only

04 • People & Skills

General AI literacy across the org	Emerging
In-house AI / ML skills	None
AI training / enablement offered?	No
Change management for AI adoption	Informal

05 • Governance & Risk

AI acceptable-use policy?	None
Ungoverned (shadow) AI usage	Some
Data security / privacy controls for AI	Basic

How scoring works

Each answer maps to a 0–100 maturity value based on what it signals. Stage scores are the average of the answered, scored questions in that stage; the overall score is the average of assessed stages. Some questions are informational context and are not scored. Bands: AI-Ready 80+ · Advancing 60+ · Developing 40+ · Emerging 20+ · Unprepared 0+.

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